

Procurement Items Overview

Procurement items and categories in Cardinal are synonymous with the National Institute of Governmental Purchasing (NIGP) standards. Users with the Contract Administrator or Buyer role can manage procurement items necessary to build and manage contracts and/or establish item/supplier relationships.

Item setup is integral to the Cardinal Procurement module because it provides a means to track commodity prices, quantities used, market trends, and quality of goods/services received from suppliers by item, helping you make better purchasing decisions. Only authorized Fiscal Division Inventory Programs Section (IPS) and Administrative Services Division (ASD) employees can establish new items and define item attributes. The Contract Administrator and Buyer have access to create an item/supplier relationship for an item.

Item attributes include an Item Category and Item ID number, the purchasing description, Unit of Measure (UOM), related suppliers, pricing information, and WebIMS inventory ID (if applicable).

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Understanding Items

The item code structure we use in purchasing is the National Institute of Governmental Purchasing (NIGP) standard. NIGP establishes categories that group the item codes into commodities, which are represented by a 3-digit class code, 5-digit class-item code, and a 7-digit class-item-group code. 10-digit values are very specific and have a fixed Unit of Measure (UOM).

Cardinal purchasing shares its information about items with other Cardinal financial modules, as well as eVA. Suppliers must be registered in eVA, which interfaces into Cardinal, in order to receive contract awards or purchase orders.

Although each item established in Cardinal is directly associated with one category, a hierarchy of categories is established. This hierarchy is used by the Cardinal item search function so you may logically navigate to an item.

There are two categories of NIGP numbers or Class Code (represented by the 1st three digits):

- 001 – 899 represent goods
- 900 – 999 represent services

The following is an example of the 10-digit NIGP code structure breakout for **Item ID 7507731047**.

<u>Item ID</u>	<u>Category</u>	<u>Description</u>
750	Class Code	Road Materials Not Asphaltic
75077	Item	Sand and Gravel
7507731	Group	Gravel
7507731047	Detail*	No. 9 UOM=Ton


*The last two digits of the **Item ID**, also referred to as Detail in the NIGP code structure, are assigned by the Fiscal Inventory Manager when the new item is set up in Cardinal.

Add Items

Once you confirm that the desired NIGP item does not exist in Cardinal, contact the ASD or Fiscal Division to have it added. If an item is specific to inventory (i.e., WebIMS) the item must be assigned an IMS Stock Number before it can be added to Cardinal. Once WebIMS is updated, the new NIGP number/**Item ID** can be assigned.

General Item Information

- Items and categories in Cardinal match NIGP and eVA item numbering.
- **Item:** 10 digits with the **Description** and **UOM** field predetermined and cannot be changed.
- **Category:** 3, 5, or 7 digits and the **Description** and **UOM** may be edited.
- Inventory items must be 10 digits and have an associated WebIMS number.
- Item/supplier relationships are required when building contracts.
- Item/supplier relationships are not required when building requisitions, purchase orders (PO), and sourcing events.

Line Items ?									
Basic Definition		Advanced Definition							
Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting	
<input type="checkbox"/> 1	7503548480	STONE, CRUSHED GRADE 25	 7503548	LTN	15000.0000	12.4900	\$187,350.00		0.00000

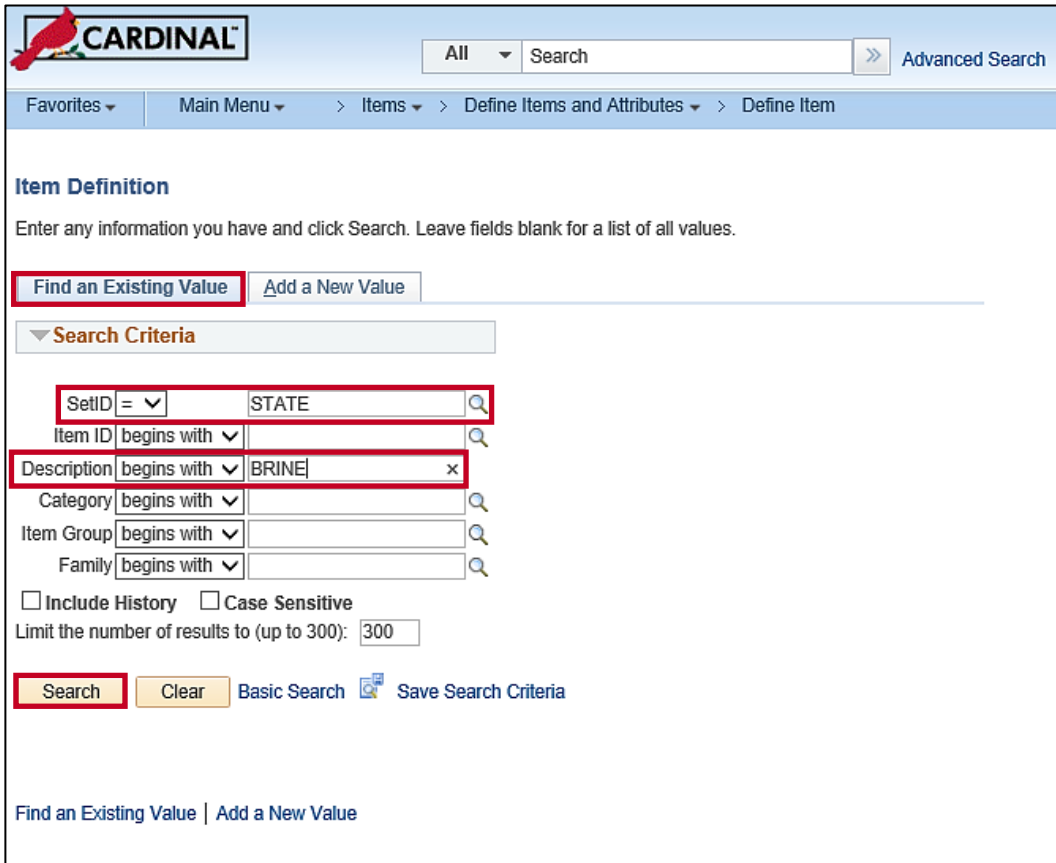
Example: Item shown displays pre-populated **Description**, **Category**, and **UOM**

Search for an Item

1. A request is made to add an NIGP item. You must first confirm that the item does not exist in Cardinal. If it does exist, verify its **Purchasing Attributes**. To search for the item, navigate to the **Item Definition** page using the following path:


Main Menu > Items > Define Items and Attributes > Define Item

2. The **Item Definition** page displays.



The screenshot shows the 'Item Definition' page in the Cardinal system. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and a breadcrumb trail: 'Items > Define Items and Attributes > Define Item'. Below the navigation bar, the page title 'Item Definition' is displayed, followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (highlighted with a red box) and 'Add a New Value'. Under the 'Find an Existing Value' tab, there is a 'Search Criteria' section. This section contains several search fields: 'SetID' (with a dropdown menu and 'STATE' entered), 'Item ID' (with a 'begins with' dropdown), 'Description' (with a 'begins with' dropdown and 'BRINE' entered), 'Category' (with a 'begins with' dropdown), 'Item Group' (with a 'begins with' dropdown), and 'Family' (with a 'begins with' dropdown). Each field has a magnifying glass icon to its right. Below these fields, there are checkboxes for 'Include History' and 'Case Sensitive', and a text input for 'Limit the number of results to (up to 300):' with '300' entered. At the bottom of the search criteria section, there are buttons for 'Search' (highlighted with a red box), 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

3. Click the **Find an Existing Value** tab.
4. Ensure that **STATE** is listed in the **SetID** field.
5. In the **Description** field, enter the search term using the various search criteria available.
6. Click the **Search** button to initiate the search.


CARDINAL

All ▾ Search >> Advanced Search

Favorites ▾ Main Menu ▾ > Items ▾ > Define Items and Attributes ▾ > Define Item

Item Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

SetID = ▾ STATE x 🔍
Item ID begins with ▾ 🔍
Description contains ▾ BRINE 🔍
Category begins with ▾ 🔍
Item Group begins with ▾ 🔍
Family begins with ▾ 🔍
☐ Include History ☐ Case Sensitive
Limit the number of results to (up to 300): 300

Search Clear Basic Search 🔍 Save Search Criteria

Search Results

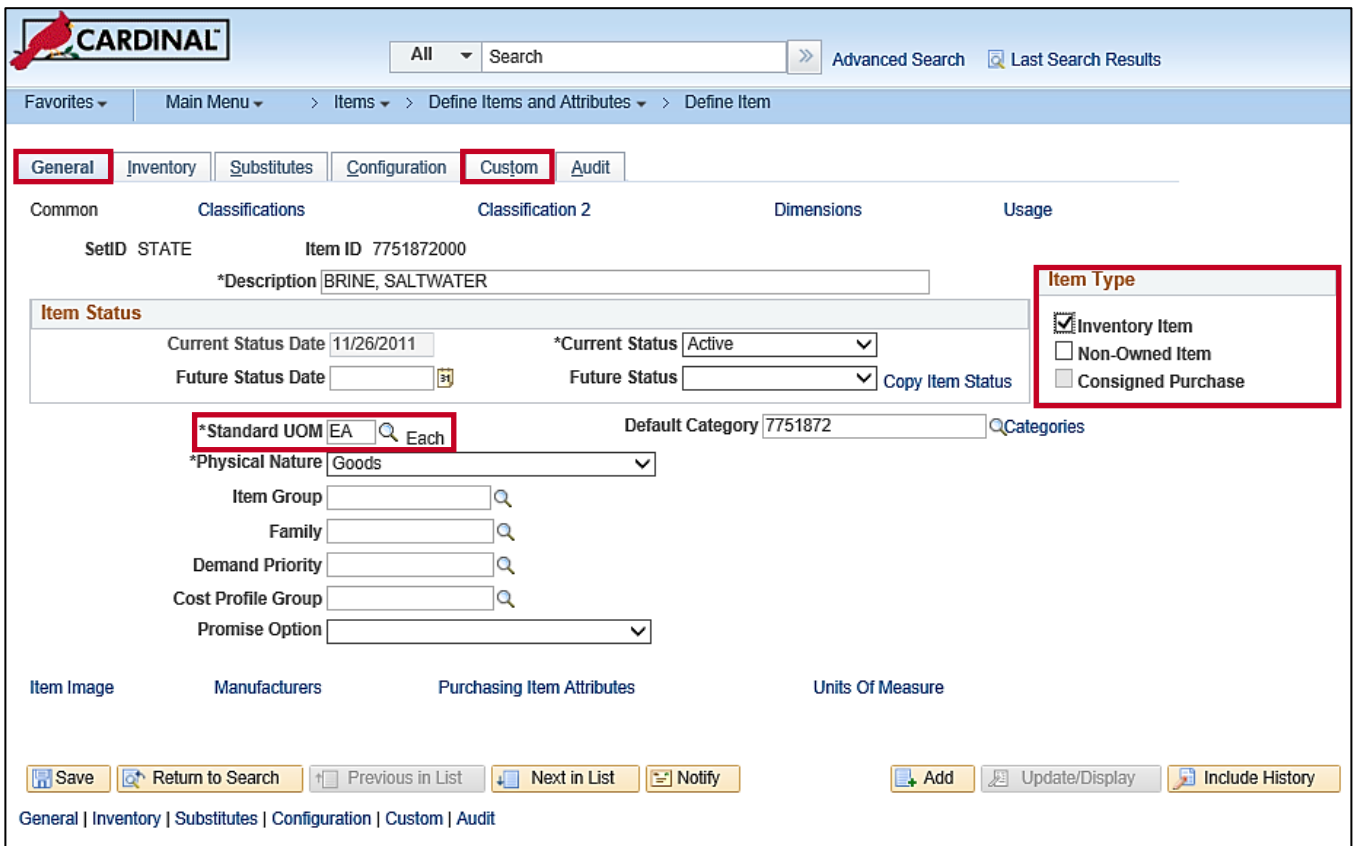
View All First ◀ 1-2 of 2 ▶ Last

SetID	Item ID	Description	Category	Item Group	Family
STATE 7751872000		BRINE, SALTWATER	7751872	(blank)	(blank)
STATE 5456501000		SALT BRINE PRODUCTION EQUIPMEN	5456501	(blank)	(blank)

Find an Existing Value Add a New Value

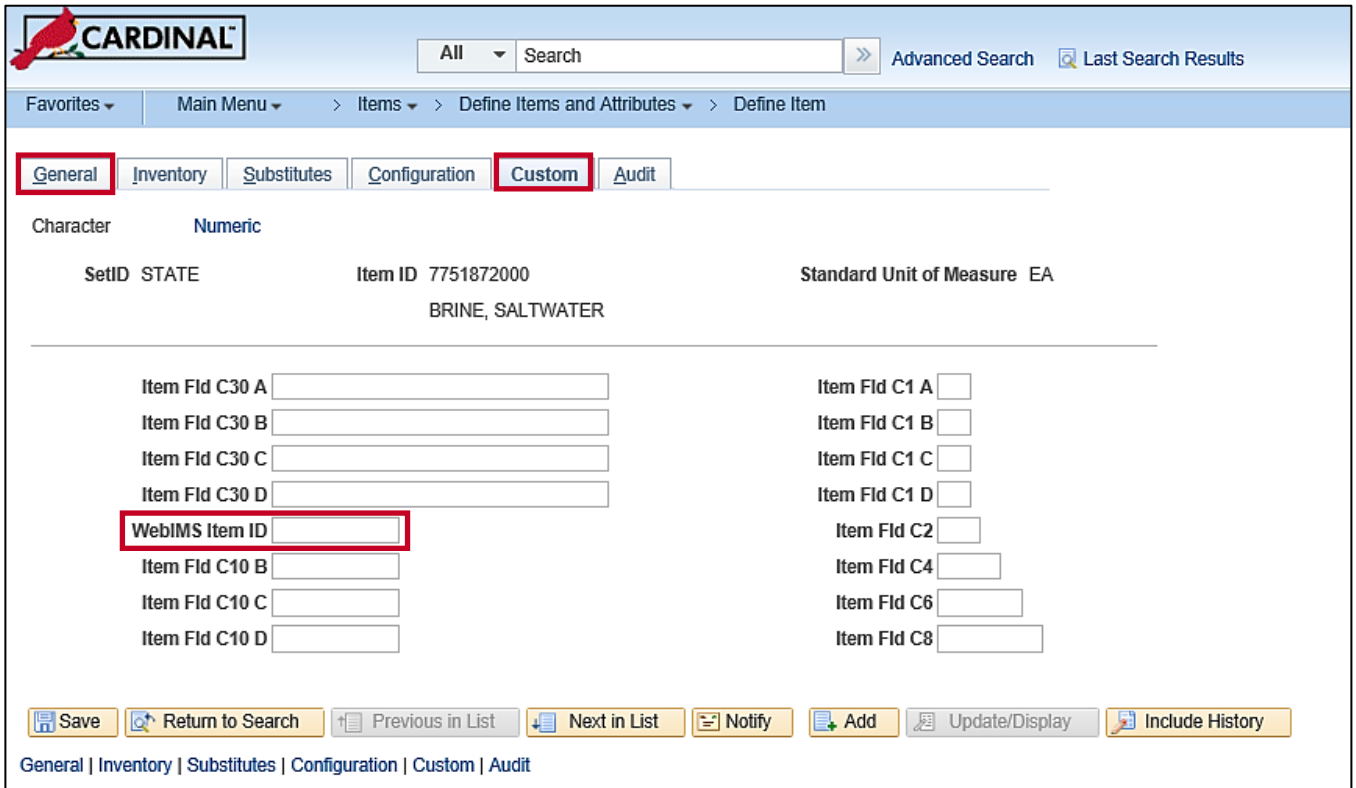
- A listing appears that displays all items that match the search term(s). If the item you are searching for is listed then it is indeed an NIGP item and you do not need to add it.
- Select an item to view its attributes.

- The **General** tab displays by default.



The screenshot shows the 'Define Item' page in the Cardinal system. The 'General' tab is active. The 'Item ID' is 7751872000 and the '*Description' is 'BRINE, SALTWATER'. The 'Item Status' section shows 'Current Status' as 'Active' and 'Future Status' as 'Copy Item Status'. The 'Item Type' section has 'Inventory Item' checked. The '*Standard UOM' is 'EA' and the 'Physical Nature' is 'Goods'. The 'Default Category' is '7751872'. The 'Units Of Measure' section is visible at the bottom.

- The **Standard UOM** (Unit of Measure) values in Cardinal match those in WebIMS. The value assigned here interfaces to eVA.
- Check the **Inventory Item** check-box for all WebIMS items.
- Click the **Custom** tab.



CARDINAL All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Define Item

General Inventory Substitutes Configuration **Custom** Audit

Character Numeric

SetID STATE Item ID 7751872000 Standard Unit of Measure EA
BRINE, SALTWATER


Item Fld C30 A
Item Fld C30 B
Item Fld C30 C
Item Fld C30 D
WebIMS Item ID
Item Fld C10 B
Item Fld C10 C
Item Fld C10 D

Item Fld C1 A
Item Fld C1 B
Item Fld C1 C
Item Fld C1 D
Item Fld C2
Item Fld C4
Item Fld C6
Item Fld C8

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

13. If the **WebIMS Item ID** field is blank, the item is not a WebIMS inventory item. If the item is a WebIMS-related item, a value is listed.
14. Click the **General** tab.



All Search
Advanced Search
Last Search Results

Favorites Main Menu Items Define Items and Attributes Define Item

General Inventory Substitutes Configuration Custom Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872000

*Description BRINE, SALTWATER

Item Status

Current Status Date 11/26/2011 *Current Status Active
Future Status Date Future Status Copy Item Status

*Standard UOM EA Each
*Physical Nature Goods
Item Group
Family
Demand Priority
Cost Profile Group
Promise Option

Default Category 7751872 Categories

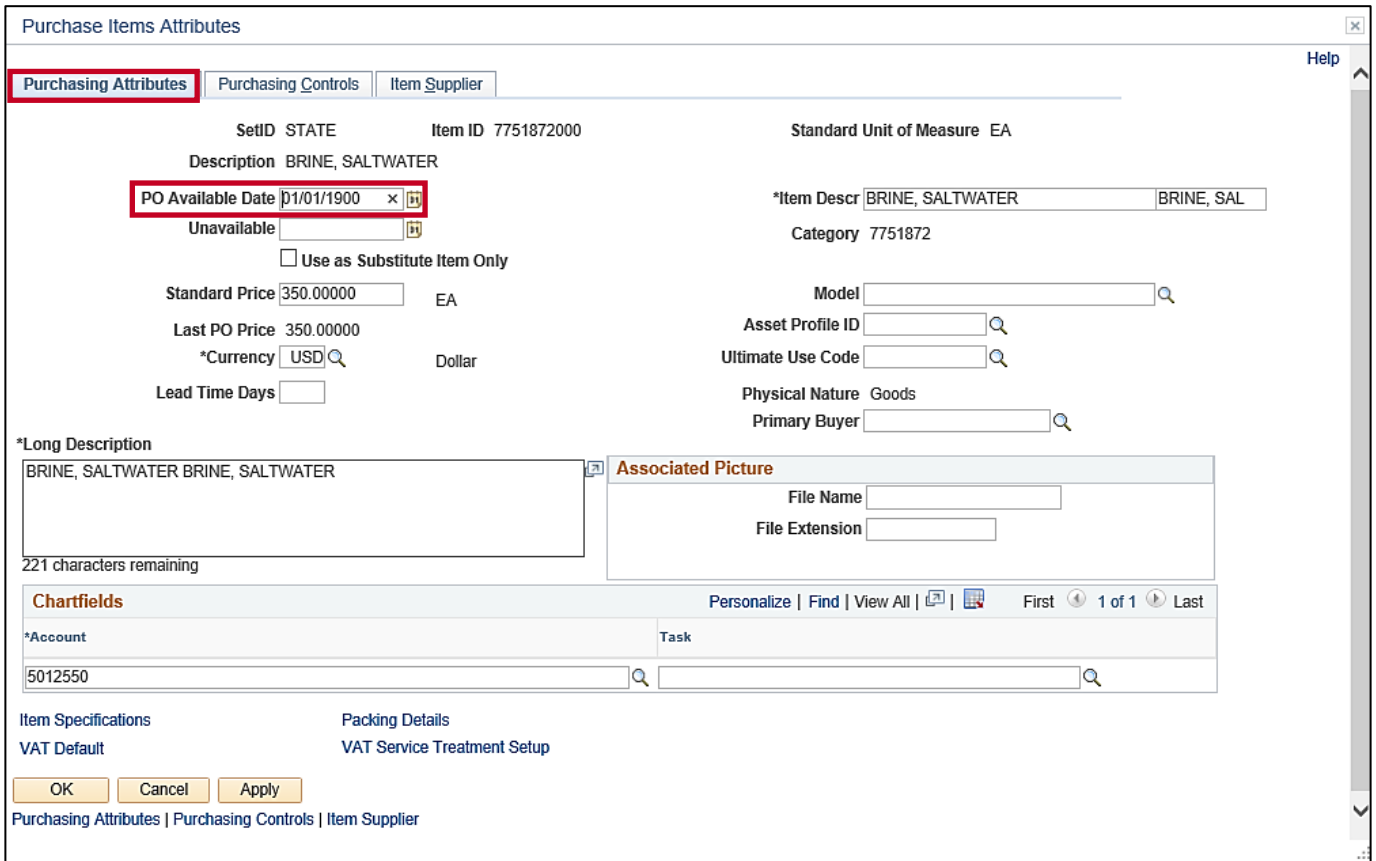
Item Image Manufacturers **Purchasing Item Attributes** Units Of Measure

Save Return to Search Previous in List Next in List Notify
Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

15. Click the **Purchasing Item Attributes** link.

16. The **Purchasing Attributes** tab for the **Item** displays in a pop-up window.



17. The item is available if the **PO Available Date** field has a date value less than today. If the item is available, respond back to the requester and provide them with the **Item ID** (i.e., 10-digit NIGP number), a description of the item, and let them know if the item is a WebIMS inventory item. If the requester does not feel the existing item is specific for their use, you may need to add a new item.
18. If the requested item does not exist in Cardinal, users with the Fiscal Inventory Manager role can set up a new item.

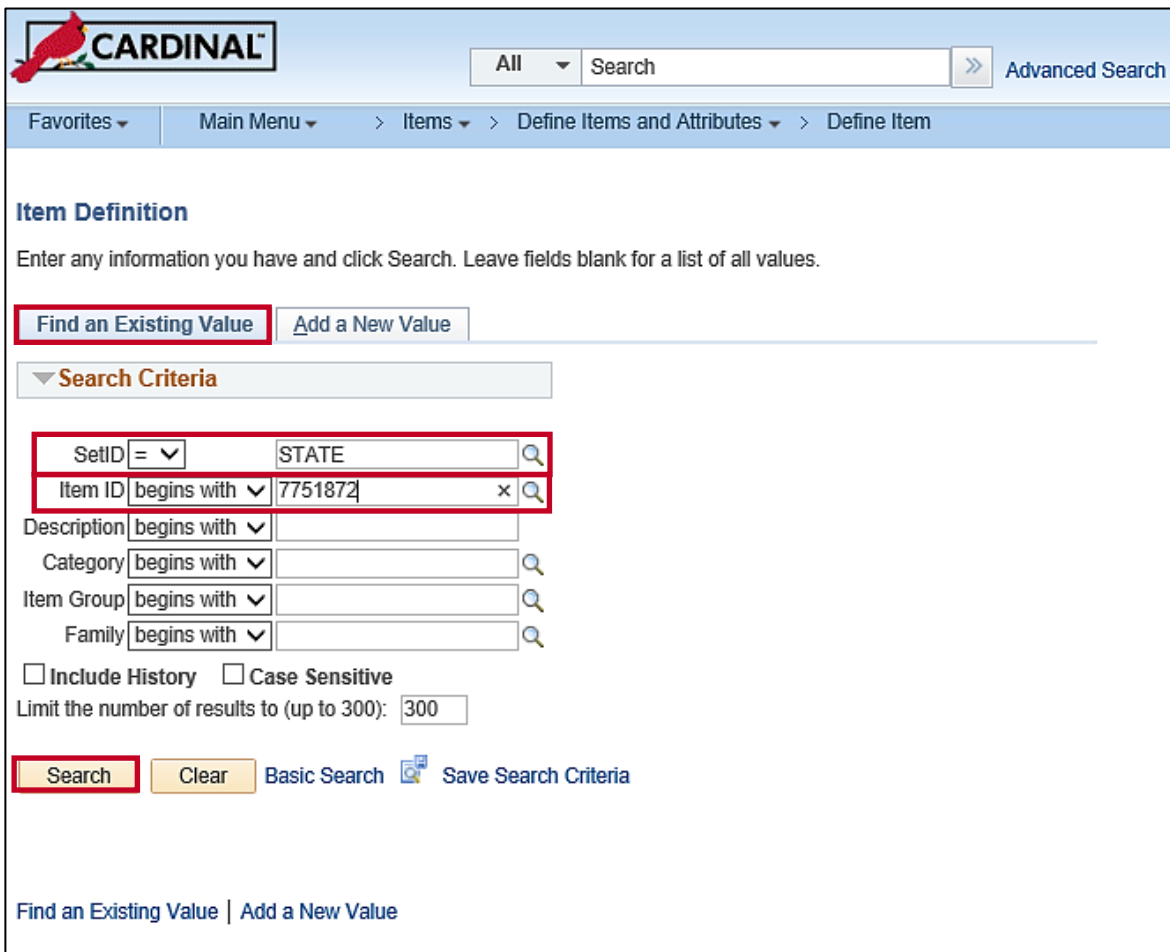
Adding a New NIGP Number (Item ID)

Users must have the Fiscal Inventory Manager role in order to set up new items in Cardinal.

1. First you will need to determine the new item number using the NIGP Code Structure. (Refer to the [Add Items](#) section at the beginning of this job aid for the NIGP Code Structure).
2. Navigate to the **Item Definition** page using the following path:

Main Menu > Items > Define Items and Attributes > Define Item

- The **Item Definition** page displays.



CARDINAL

All Search Advanced Search

Favorites Main Menu > Items > Define Items and Attributes > Define Item

Item Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

SetID = STATE

Item ID begins with 7751872 x

Description begins with

Category begins with

Item Group begins with

Family begins with

☐ Include History ☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

- Click the **Find an Existing Value** tab.
- Ensure that **STATE** is listed in the **SetID** field.
- In the **Item ID** field, enter the first five or seven digits of the general category from the previous search. This allows you to easily search for all items with this general category based on the NIGP Code Structure. (Refer to the [Add Items](#) section at the beginning of this job aid for the NIGP Code Structure).

Item ID	Category	Description
1 st 3 rd Digits	Class	Road Materials Not Asphaltic
4 th and 5 th Digits	Item	Sand and Gravel
6 th and 7 th Digits	Group	Gravel

- Click the **Search** button.

[Favorites](#) > [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

Item Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

▼ **Search Criteria**

SetID =

Item ID

Description

Category

Item Group

Family

☐ Include History ☐ Case Sensitive

Limit the number of results to (up to 300):

[Basic Search](#)

Search Results

View All First 1-2 of 2 Last

SetID	Item ID	Description	Category	Item Group	Family
STATE	7751872000	BRINE, SALTWATER	7751872	(blank)	(blank)
STATE	7751872150	420 LB/DRUM (CONTAINS 111 LBS 7751872	(blank)	(blank)	(blank)

[Find an Existing Value](#) | [Add a New Value](#)

8. A complete listing displays of all items within the **Class/Item/Group** you selected. You need to determine if there is numbering space available within this general NIGP category. If yes, you can use this general category and add the Detail number (last 3 digits of the NIGP) to it. Then you will have your complete 10-digit NIGP number for this new item.

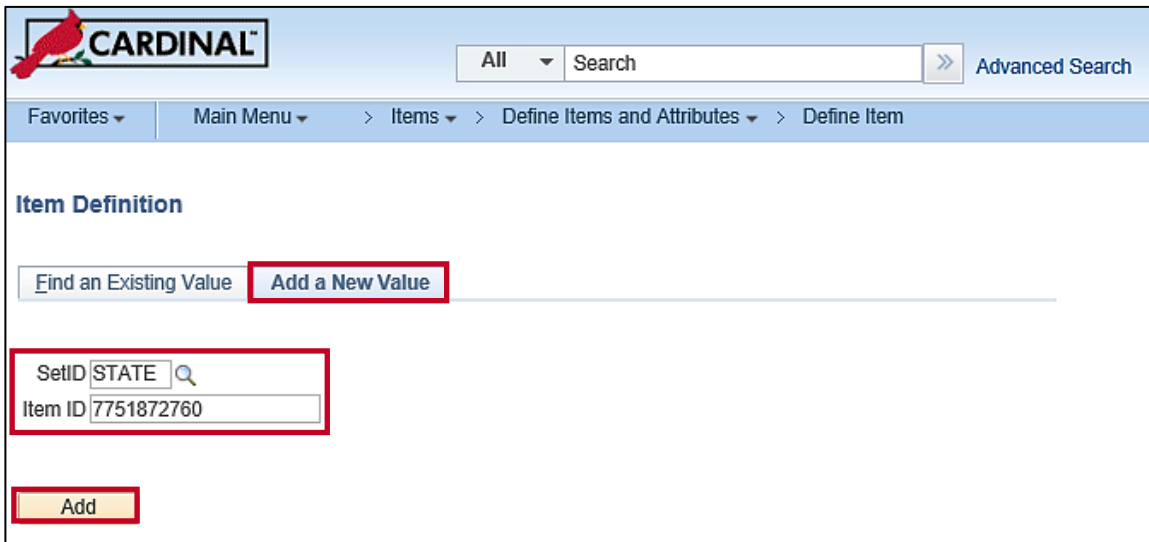
Item ID	Category	Description
1 st 3 rd Digits	Class	Road Materials Not Asphaltic
4 th and 5 th Digits	Item	Sand and Gravel
6 th and 7 th Digits	Group	Gravel
7 th , 8 th and 9 th Digits	Detail*	No. 9 UOM=Ton

*The last two digits of the NIGP number, also referred to as Detail in the NIGP code structure, are assigned by the Cardinal Fiscal Inventory Manager when the new item is set up in Cardinal. In this example there are only 2 **Item IDs** that begin with 7751872. For the Detail number you assign to the end of the NIGP number you may use any number between the two numbers. In this example, the last 3 digits of the new **Item ID** would be any number from 001 to 149 or from 151 to 999. The newly created NIGP number will be your **Item ID** number in Cardinal.

Add a New Item

9. Once you have determined the new NIGP number /**Item ID**, you will need to add it to Cardinal. Navigate to the **Item Definition** page using the following path:

Main Menu > Items > Define Items and Attributes > Define Item



CARDINAL

All Search >> Advanced Search

Favorites Main Menu > Items > Define Items and Attributes > Define Item

Item Definition

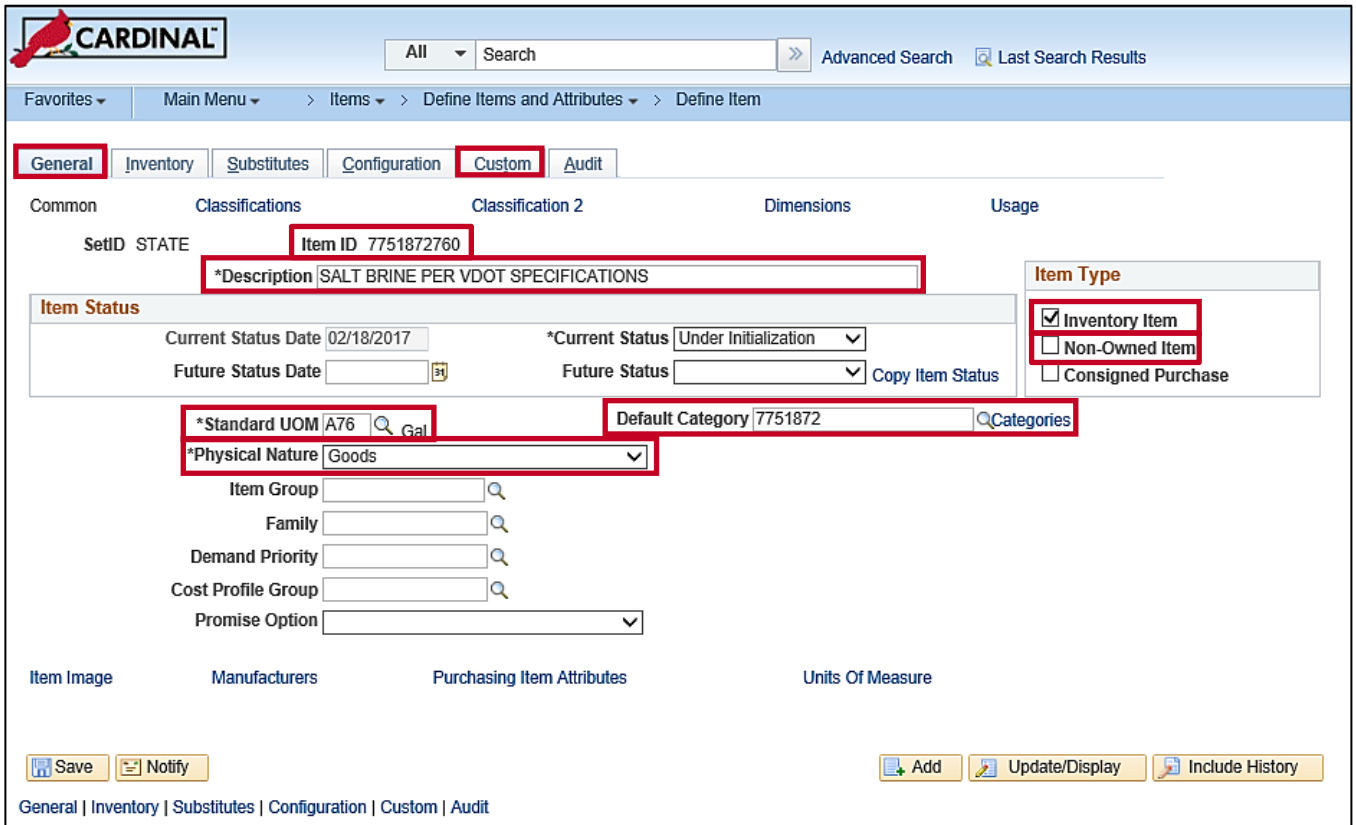
Find an Existing Value **Add a New Value**

SetID STATE

Item ID 7751872760

Add

10. Click the **Add a New Value** tab.
11. Ensure that **STATE** is listed in the **SetID** field.
12. Enter the new NIGP/**Item ID** number in the **Item ID** field. If the word **NEXT** is the defaulted value, simply delete it and enter the new **Item ID**.
13. Click the **Add** button.



CARDINAL™ All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Define Item

General Inventory Substitutes Configuration **Custom** Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

*Description SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date 02/18/2017 *Current Status Under Initialization

Future Status Date Future Status Copy Item Status

*Standard UOM A76 Gal Default Category 7751872 Categories

*Physical Nature Goods

Item Group

Family

Demand Priority

Cost Profile Group

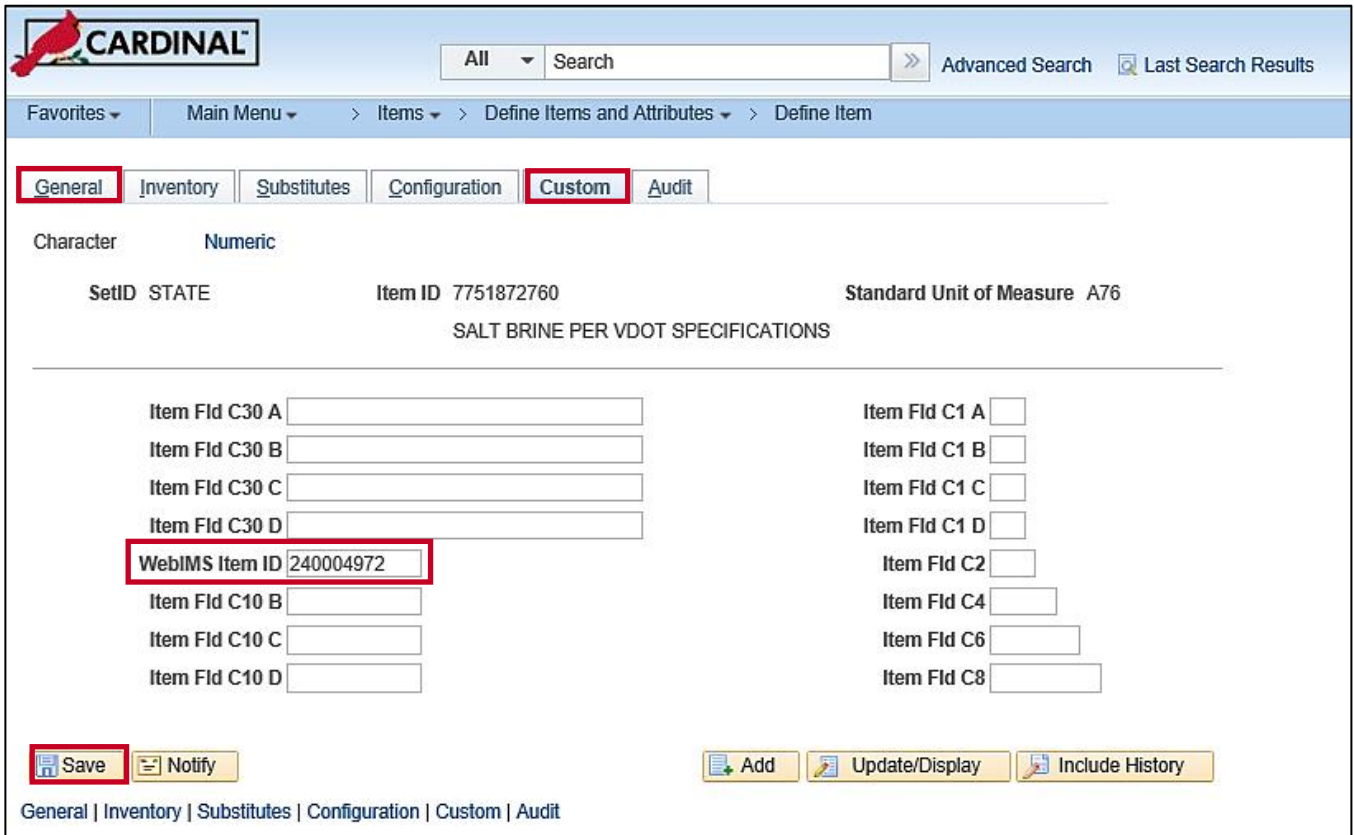
Promise Option

Item Image Manufacturers Purchasing Item Attributes Units Of Measure

Save Notify Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

14. Verify that you entered the correct 10-digit NIGP number. This is done by checking the **Item ID** number.
15. Enter/select values for the following required fields:
 - **Description**
 - **Standard UOM**
 - **Default Category** (1st seven digits of the NIGP number)
 - **Physical Nature (Goods or Services)**
16. If the item is a WebIMS inventory item, select the **Inventory Item** check-box. If it is not an inventory item, select the **Non-Owned Item** check-box.
17. Click the **Custom** tab.



CARDINAL All Search >> Advanced Search Last Search Results

Favorites Main Menu > Items > Define Items and Attributes > Define Item

General Inventory Substitutes Configuration **Custom** Audit

Character Numeric

SetID STATE Item ID 7751872760 Standard Unit of Measure A76

SALT BRINE PER VDOT SPECIFICATIONS

Item Fld C30 A

Item Fld C30 B

Item Fld C30 C

Item Fld C30 D

WebIMS Item ID

Item Fld C10 B

Item Fld C10 C

Item Fld C10 D

Item Fld C1 A

Item Fld C1 B

Item Fld C1 C

Item Fld C1 D

Item Fld C2

Item Fld C4

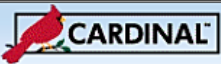
Item Fld C6

Item Fld C8

Save Notify Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

18. If the item is an inventory item, enter the **WebIMS Item ID** (i.e., stock number). If it is not an inventory item, leave the field blank.
19. Click the **Save** button.
20. Click the **General** tab.



All
Search
Advanced Search
Last Search Results

Favorites
Main Menu
Items
Define Items and Attributes
Define Item

General
Inventory
Substitutes
Configuration
Custom
Audit

Common
Classifications
Classification 2
Dimensions
Usage

SetID STATE
Item ID 7751872760

*Description SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date 02/18/2017
Future Status Date
*Current Status Under Initialization
Future Status
Copy Item Status

*Standard UOM A76 Gal
Default Category 7751872 Categories

*Physical Nature Goods

Item Group
Family
Demand Priority
Cost Profile Group
Promise Option

Item Image
Manufacturers
Purchasing Item Attributes
Units Of Measure

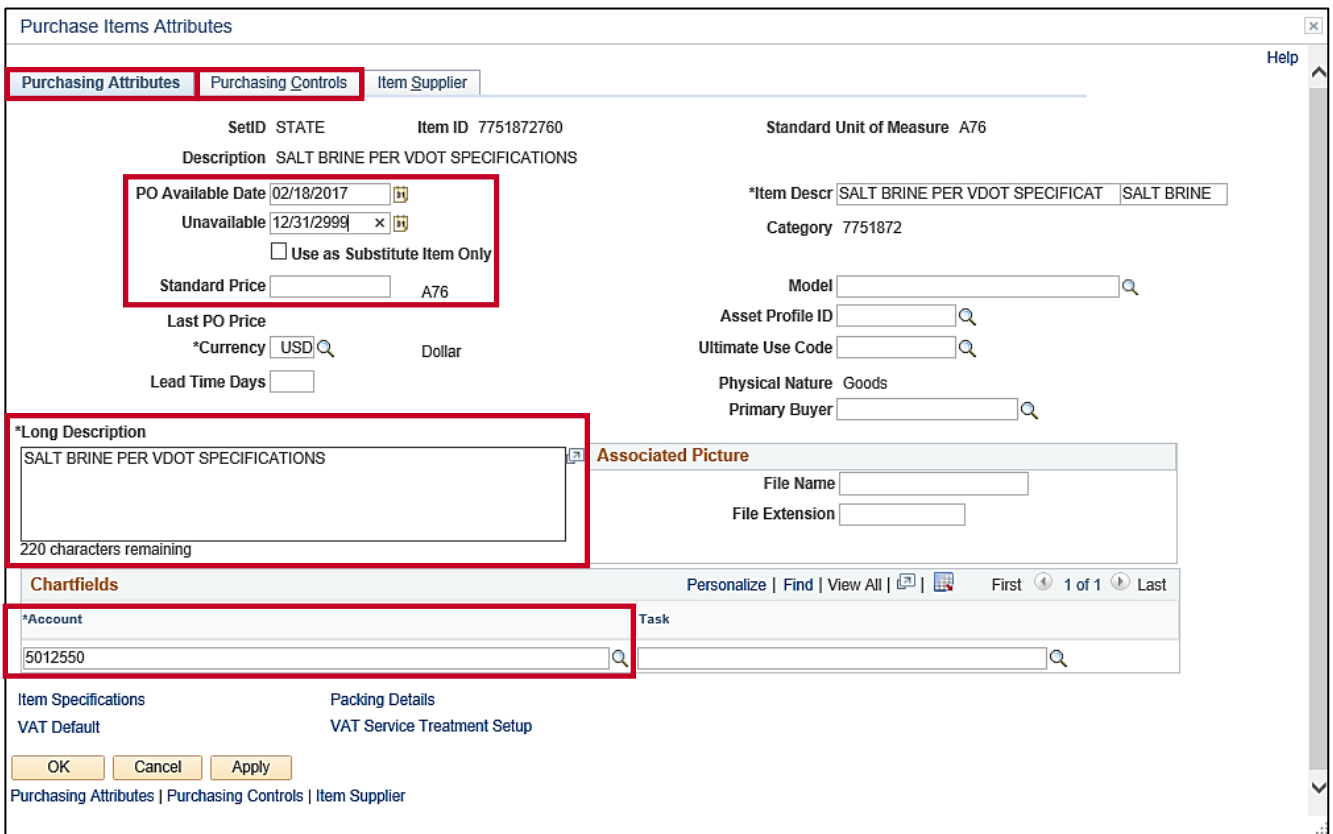
Save
Notify

Add
Update/Display
Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

21. Click the **Purchasing Item Attributes** link.

22. The **Purchase Items Attributes** page displays.



23. The **PO Available Date** will default to today's date. Do not change this value.

24. In the **Unavailable** date field enter **12/31/2999**.

25. In the **Standard Price** field enter **.01** (one cent).

26. If the **Description** you entered on the previous page was shortened, you may enter the full description into the **Long Description** field.

27. In the **Chartfields** section, a default **Account** value may populate. If an **Account** value does not default, you need to enter one.

28. Click the **Purchasing Controls** tab.

Purchase Items Attributes Help

Purchasing Attributes **Purchasing Controls** Item Supplier

SetID STATE Item ID 7751872760 Standard Unit of Measure A76

Description SALT BRINE PER VDOT SPECIFICATIONS

Expand All Collapse All

- ▶ Matching Controls
- ▶ Receiving Controls
- ▶ Sourcing Controls
- ▶ Misc. Controls and Options
- ▶ WorkFlow Notification Controls

BU Attributes

OK Cancel Apply

Purchasing Attributes | Purchasing Controls | Item Supplier

29. All sections are collapsed for this panel group.
30. Click the **Expand All** link to see all available fields.

Purchase Items Attributes

Purchasing Attributes | Purchasing Controls | Item Supplier

SetID STATE Item ID 7751872760 Standard Unit of Measure A76

Description SALT BRINE PER VDOT SPECIFICATIONS

Expand All Collapse All

Matching Controls

Tolerance Over		Tolerance Under	
Unit Price Tolerance	0.00000		0.00000
% Unit Price Tolerance	0.01		999.99
Ext Price Tolerance	0.00000		0.00000
% Ext Price Tolerance	10.50		999.99

Receiving Controls

*Receiving Required Required

☒ Reject Qty Over Tolerance

Qty Rcvd Tolerance % 10.00

*Partial Qty Recvd/Warn

Early Ship Reject Days 2

☐ Inspection Required

Inspect Sample Percent 0.00

*Inspection UOM Standard

Inspect ID

Sourcing Controls

☐ Use Category Sourcing Controls

Lead Time Factor % 0.00

Price Factor % 0.00

*Sourcing Method B Basic

Ship to Priority Factor % 0.00

Supplier Priority Factor % 0.00

Misc. Controls and Options

☒ Auto Select

☒ Accept Any Supplier

☒ Accept Any Ship To

☒ Available in All Regions

Close PO Under Percent Tol

Ship Via

☐ Contract Required

☐ RFQ Required

☐ Stockless Item

☒ Taxable

☒ Include in Planning

WorkFlow Notification Controls

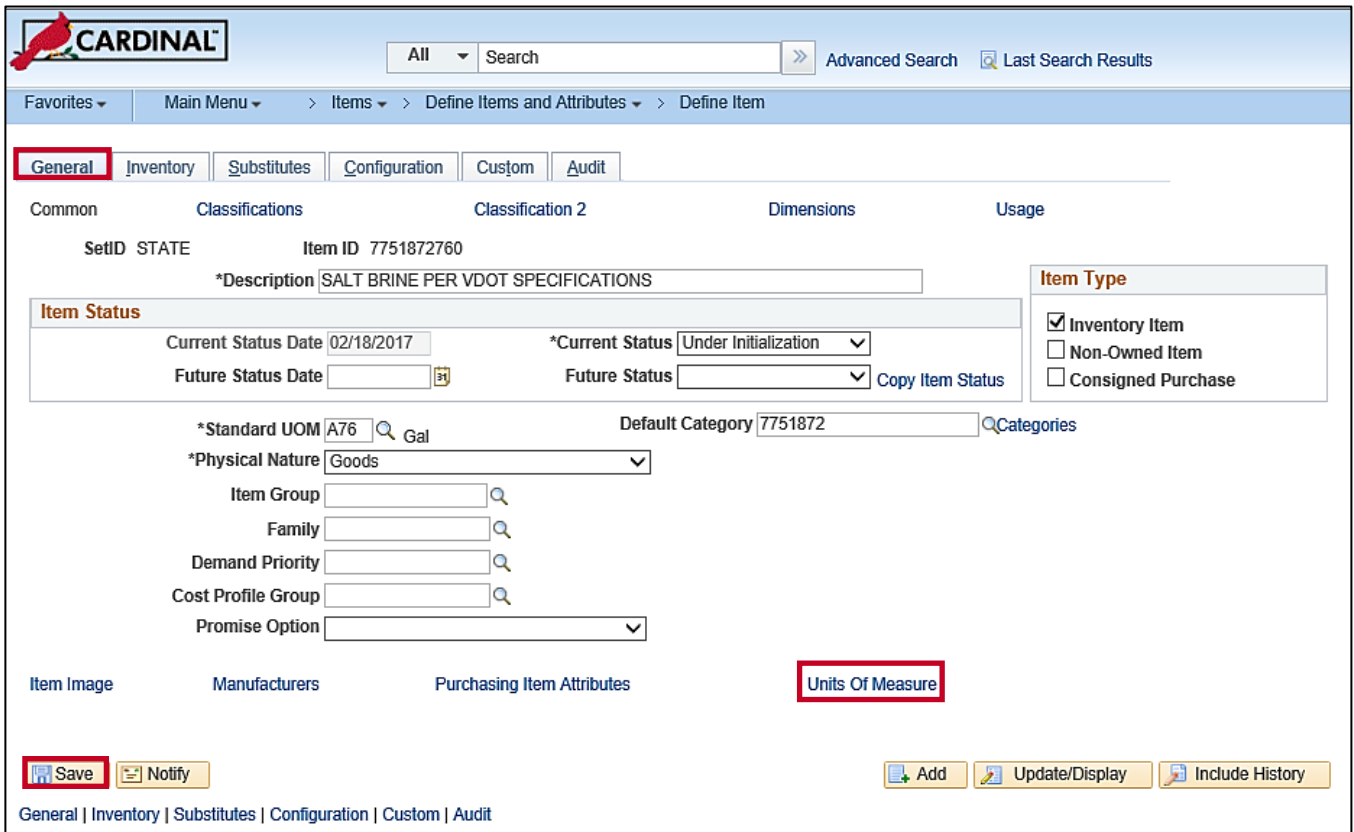
OK Cancel Apply

BU Attributes

Purchasing Attributes | Purchasing Controls | Item Supplier

31. Some fields will have default values and are grayed out.
32. Enter valid values in required fields, as applicable:
 - **Unit Price Tolerance:** defaults to **0.00**.
 - **Ext Price Tolerance:** defaults to **0.00**.
 - **Receiving Required:** drop-down menu should always be set to **Required**.
 - **Qty Rcvd Tolerance %:** set to **10** for bulk commodities. All others are set to **0**.
33. Click the **Apply** button.
34. Click the **OK** button.

35. The **General** tab displays.



The screenshot shows the 'Define Item' form in the Cardinal system, specifically the 'General' tab. The form is titled 'CARDINAL' and includes a search bar with 'All' and 'Search' options. The breadcrumb trail is: Favorites > Main Menu > Items > Define Items and Attributes > Define Item. The 'General' tab is selected, with other tabs being Inventory, Substitutes, Configuration, Custom, and Audit. The form is organized into sections: Common, Classifications, Classification 2, Dimensions, and Usage. The 'Common' section includes fields for SetID, STATE, Item ID (7751872760), and *Description (SALT BRINE PER VDOT SPECIFICATIONS). The 'Item Status' section contains Current Status Date (02/18/2017), *Current Status (Under Initialization), Future Status Date, Future Status, and a Copy Item Status button. The 'Classifications' section includes *Standard UOM (A76 Gal), *Physical Nature (Goods), Item Group, Family, Demand Priority, Cost Profile Group, and Promise Option. The 'Usage' section includes Item Type (Inventory Item, Non-Owned Item, Consigned Purchase) and Item Image. The 'Dimensions' section includes Default Category (7751872) and Categories. The 'Units Of Measure' link is highlighted in a red box. At the bottom, there are buttons for Save, Notify, Add, Update/Display, and Include History. The footer shows the breadcrumb trail: General | Inventory | Substitutes | Configuration | Custom | Audit.

36. Click the **Save** button.

37. If the item can be received and accepted in fractions, click the **Units of Measure** link.

Modify the Unit of Measure

Units of Measure

SetID STATE
Item ID 7751872760

SALT BRINE PER VDOT SPECIFICATIONS

Convert To

Standard Unit of Measure A76 Gal

Convert From

*Unit of Measure A76 Gal

*Conversion Rate 1.00000000

*Quantity Precision **Decimal**

☒ Default Stocking UOM
☐ Default Req UOM

Rounding Rule
☒ **Natural Round**
☐ Round Up

UOM Weight/Volume
Global Trade Item Number

Unit of Measure Type

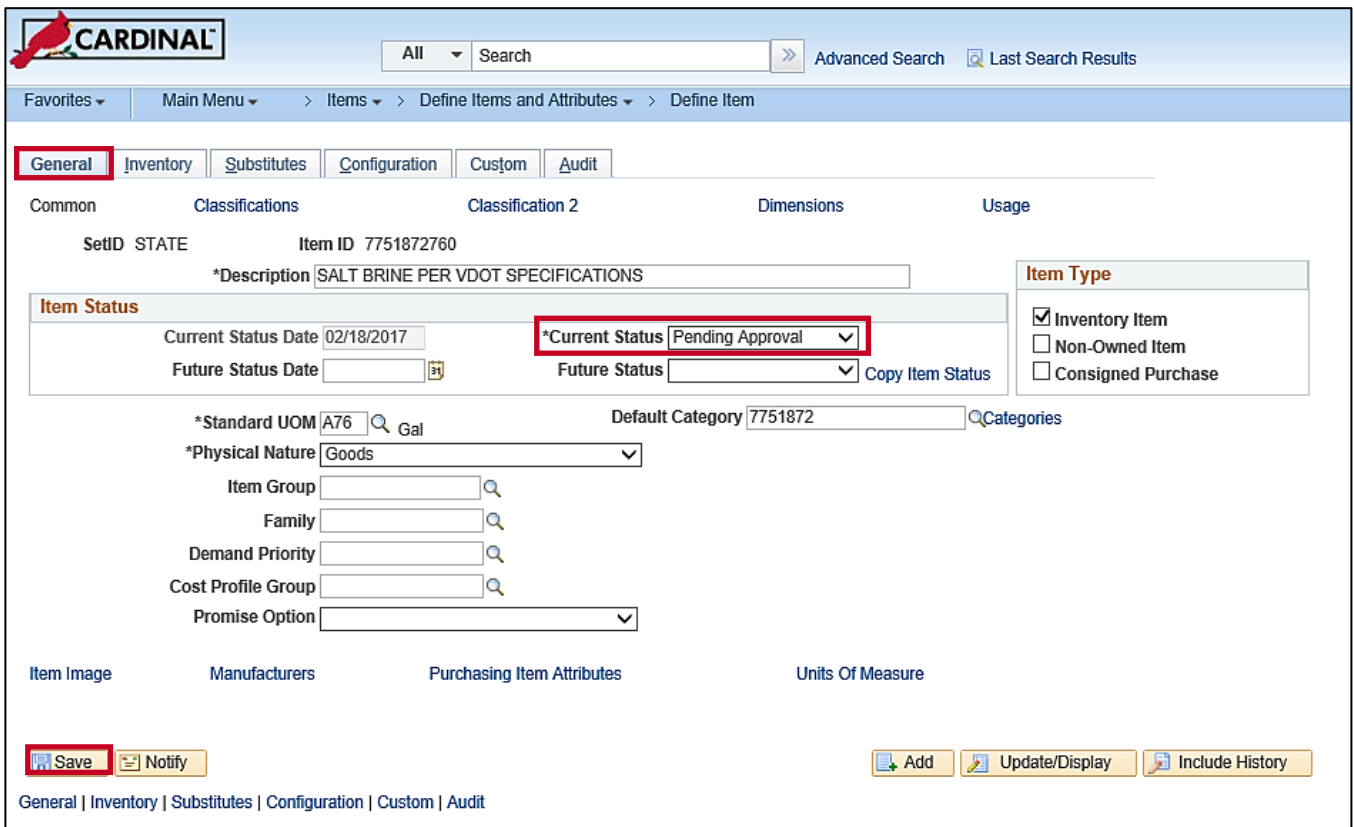
Unit of Measure Type

Ordering
Shipping
Stocking

OK
Cancel
Apply

38. Using the **Quantity Precision** drop-down menu, select **Decimal**.
39. The **Rounding Rule** section should always be set to **Natural Round**.
40. Click the **Apply** button.
41. Click the **OK** button.

42. The **General** tab displays.

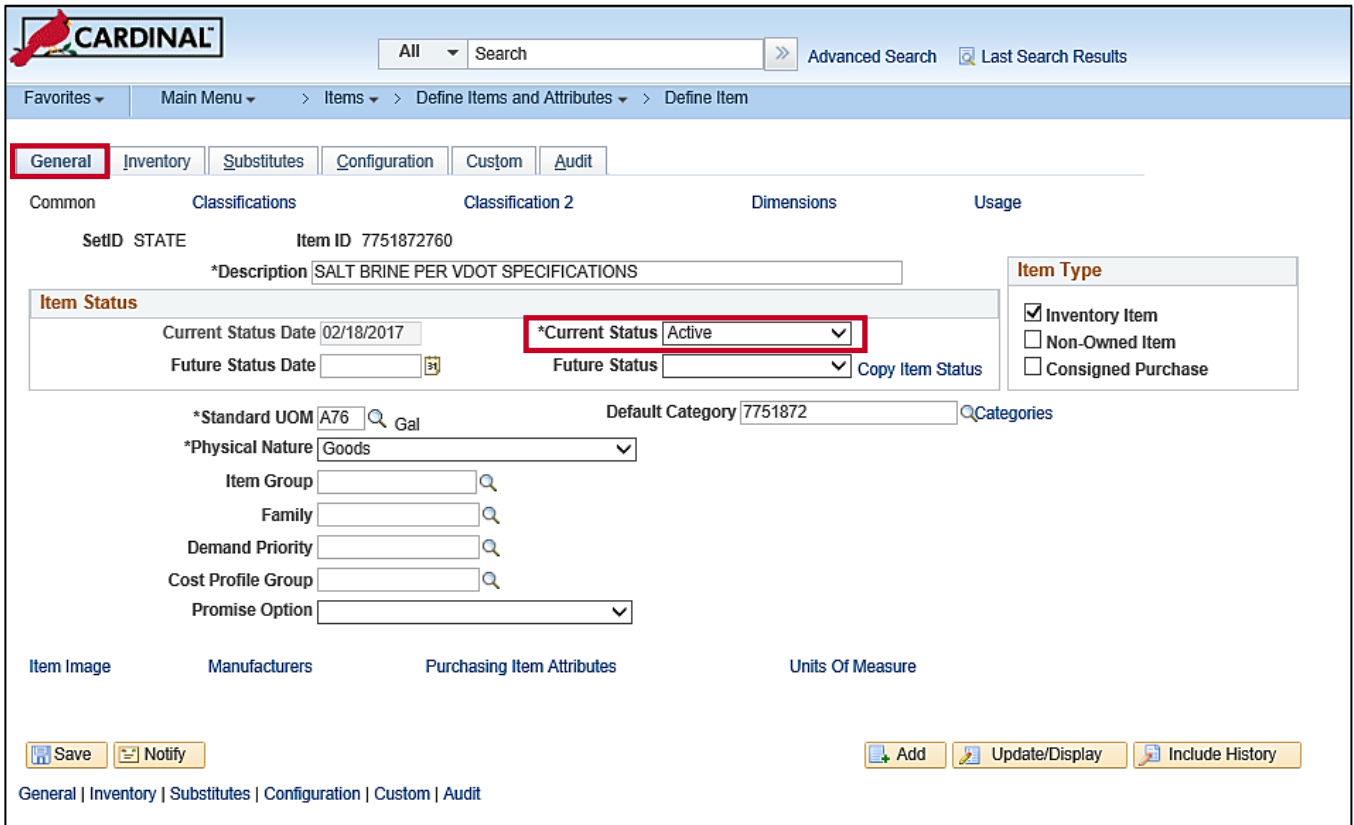


The screenshot shows the 'Define Item' form in the Cardinal system, specifically the 'General' tab. The form is titled 'CARDINAL' and includes a search bar at the top. The breadcrumb trail indicates the path: 'Main Menu > Items > Define Items and Attributes > Define Item'. The 'General' tab is selected, and the 'Item ID' is 7751872760. The description is 'SALT BRINE PER VDOT SPECIFICATIONS'. The 'Current Status' is set to 'Pending Approval'. The 'Current Status Date' is 02/18/2017. The 'Future Status Date' is empty. The 'Future Status' is set to 'Copy Item Status'. The 'Standard UOM' is 'A76' and 'Gal'. The 'Default Category' is '7751872'. The 'Physical Nature' is 'Goods'. The 'Item Group', 'Family', 'Demand Priority', 'Cost Profile Group', and 'Promise Option' are all empty. The 'Item Type' section shows 'Inventory Item' checked, 'Non-Owned Item' unchecked, and 'Consigned Purchase' unchecked. The 'Save' button is highlighted. The 'Notify' button is also visible. The 'Add', 'Update/Display', and 'Include History' buttons are at the bottom right. The breadcrumb trail at the bottom is 'General | Inventory | Substitutes | Configuration | Custom | Audit'.

43. Click the **Save** button.

44. Using the **Current Status** drop-down menu, select **Pending Approval**.

45. Click the **Save** button.



CARDINAL All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Define Item

General Inventory Substitutes Configuration Custom Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

*Description SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date 02/18/2017 ***Current Status Active** Future Status Date Future Status Copy Item Status

Item Type

☒ Inventory Item ☐ Non-Owned Item ☐ Consigned Purchase

*Standard UOM A76 Gal Default Category 7751872 Categories

*Physical Nature Goods

Item Group Family Demand Priority Cost Profile Group Promise Option

Item Image Manufacturers Purchasing Item Attributes Units Of Measure

Save Notify Add Update/Display Include History

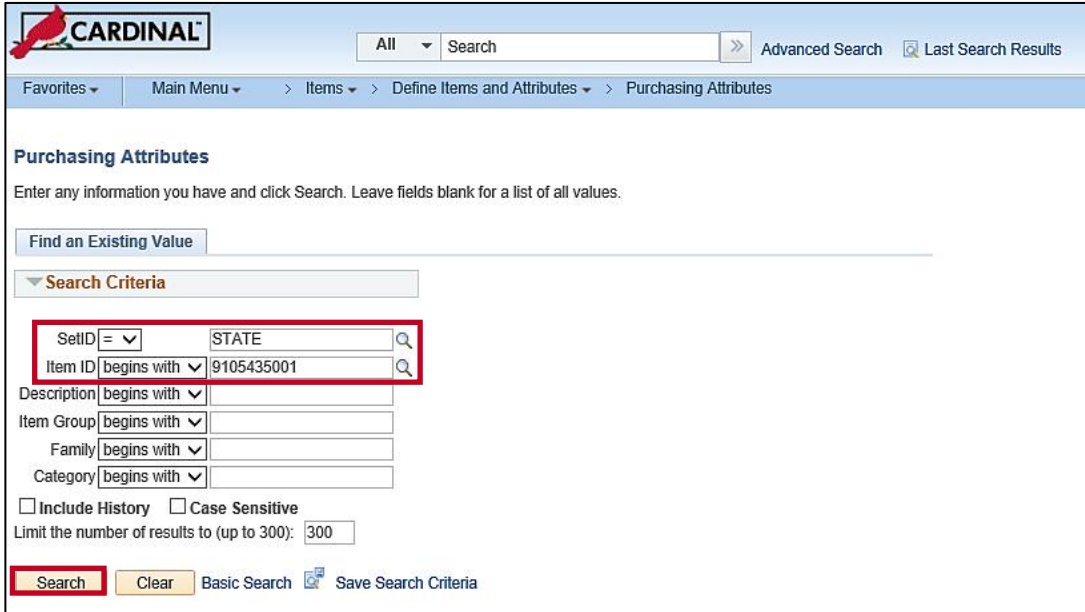
General | Inventory | Substitutes | Configuration | Custom | Audit

46. Upon **Save** the **Current Status** updates from **Pending Approval** to **Active**. Your new item is created and the process is complete.
47. Once a new NIGP number/**Item ID** is created in Cardinal, the item/supplier relationship needs to be established in Cardinal.

Create a New Item/Supplier Relationship

1. To create the item/supplier relationship in Cardinal, navigate to the **Purchasing Attributes** search page using the following path:

Main Menu > Items > Define Items and Attributes > Purchasing Attributes



CARDINAL™

All Search Advanced Search Last Search Results

Favorites Main Menu > Items > Define Items and Attributes > Purchasing Attributes

Purchasing Attributes

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

SetID = STATE

Item ID begins with 9105435001

Description begins with

Item Group begins with

Family begins with

Category begins with

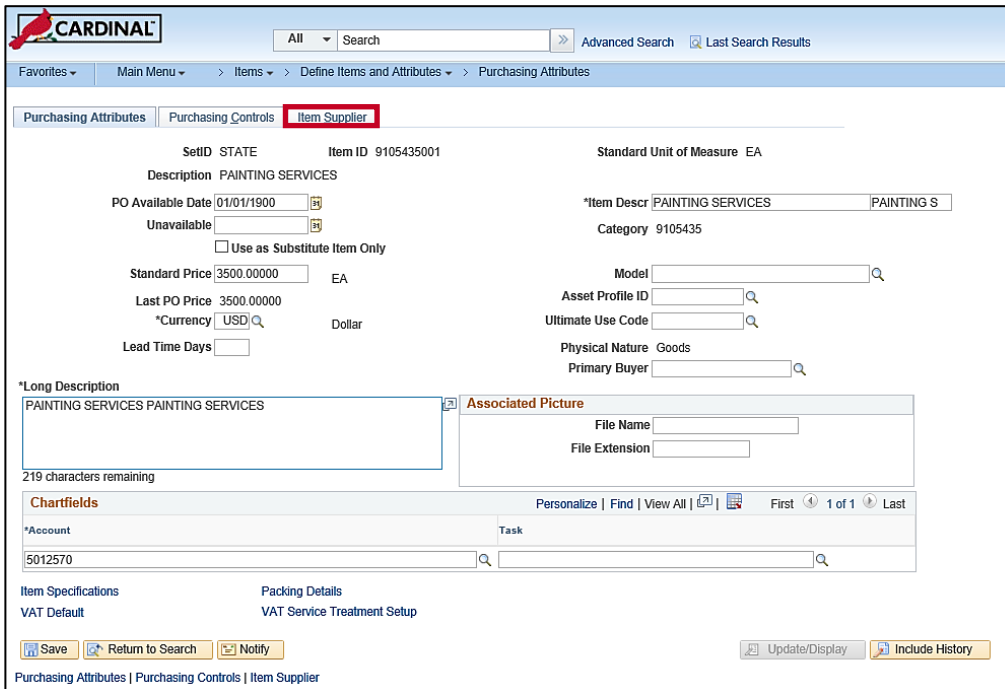
☐ Include History ☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

2. Enter the **SetID**. In this example, **STATE** is used.
3. Enter the **Item ID**. In this example, the item **9105435001** (painting services) is used.
4. Click the **Search** button.

5. The **Purchasing Attributes** page displays.



CARDINAL All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Purchasing Attributes

Purchasing Attributes Purchasing Controls **Item Supplier**

SetID STATE Item ID 9105435001 Standard Unit of Measure EA

Description PAINTING SERVICES

PO Available Date 01/01/1900

Unavailable

☐ Use as Substitute Item Only

Standard Price 3500.00000 EA

Last PO Price 3500.00000

*Currency USD Dollar

Lead Time Days

*Item Descr PAINTING SERVICES PAINTING S

Category 9105435

Model

Asset Profile ID

Ultimate Use Code

Physical Nature Goods

Primary Buyer

*Long Description

PAINTING SERVICES PAINTING SERVICES

219 characters remaining

Associated Picture

File Name

File Extension

Chartfields Personalize Find View All First 1 of 1 Last

*Account Task

5012570

Item Specifications Packing Details

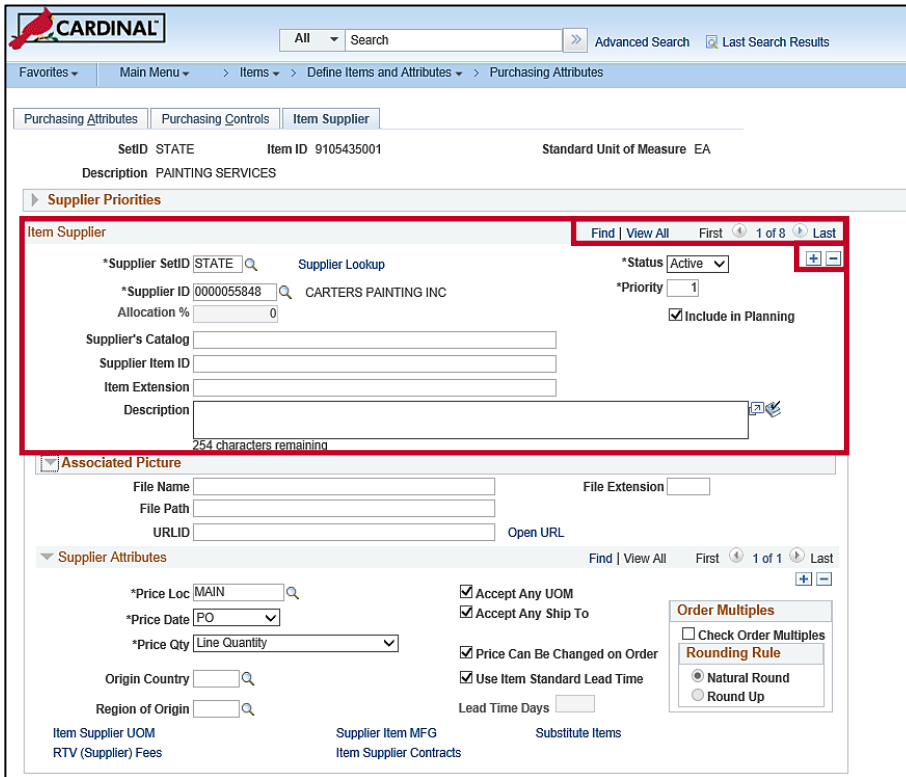
VAT Default VAT Service Treatment Setup

Save Return to Search Notify Update/Display Include History

Purchasing Attributes | Purchasing Controls | Item Supplier

6. Click the **Item Supplier** tab.

7. Suppliers with associations to the item selected display.



CARDINAL

All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Purchasing Attributes

Purchasing Attributes Purchasing Controls **Item Supplier**

SetID STATE Item ID 9105435001 Standard Unit of Measure EA

Description PAINTING SERVICES

Supplier Priorities

Item Supplier Find View All First 1 of 8 Last

*Supplier SetID STATE Supplier Lookup *Status Active

*Supplier ID 0000055848 CARTERS PAINTING INC *Priority 1

Allocation % 0 ☒ Include in Planning

Supplier's Catalog

Supplier Item ID

Item Extension

Description 254 characters remaining

Associated Picture

File Name File Extension

File Path

URLID Open URL

Supplier Attributes Find View All First 1 of 1 Last

*Price Loc MAIN *Price Date PO *Price Qty Line Quantity

Origin Country Region of Origin

Item Supplier UOM RTV (Supplier) Fees

☒ Accept Any UOM ☒ Accept Any Ship To

☒ Price Can Be Changed on Order ☒ Use Item Standard Lead Time

Lead Time Days

Order Multiples

☐ Check Order Multiples

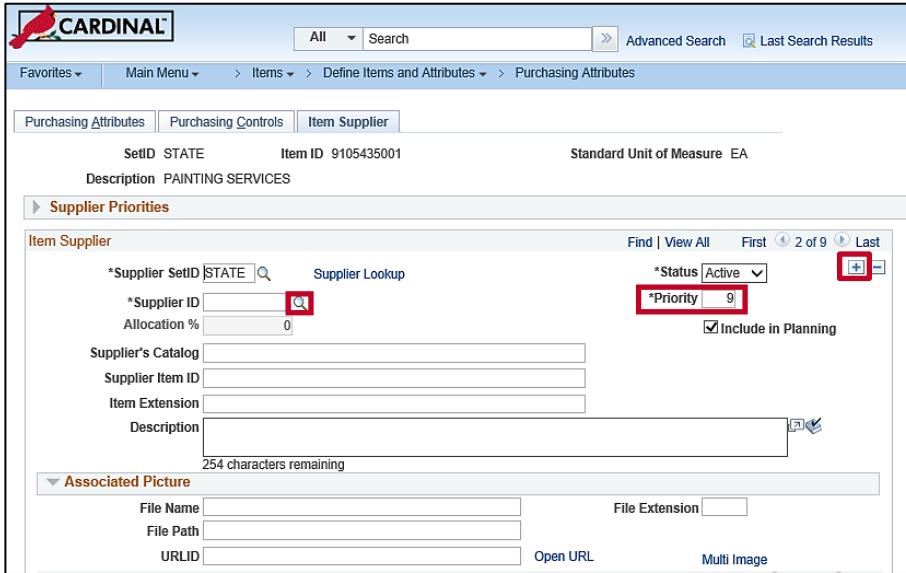
Rounding Rule

☒ Natural Round ☐ Round Up

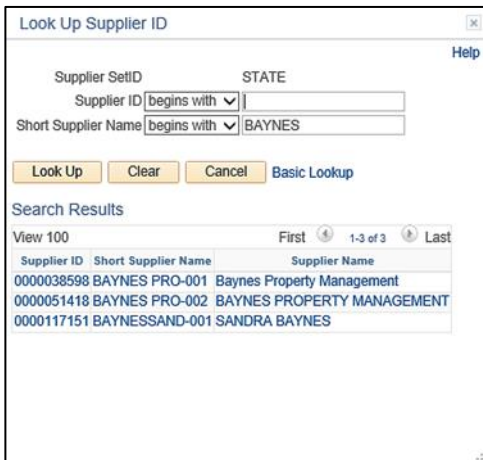
Supplier Item MFG Substitute Items

Item Supplier Contracts

8. You may view or find a particular supplier using the **Show previous row** or **Show next row** arrow icons or by clicking on the **Find** or **View All** links. In this example, our supplier is not in the list and needs to be added.



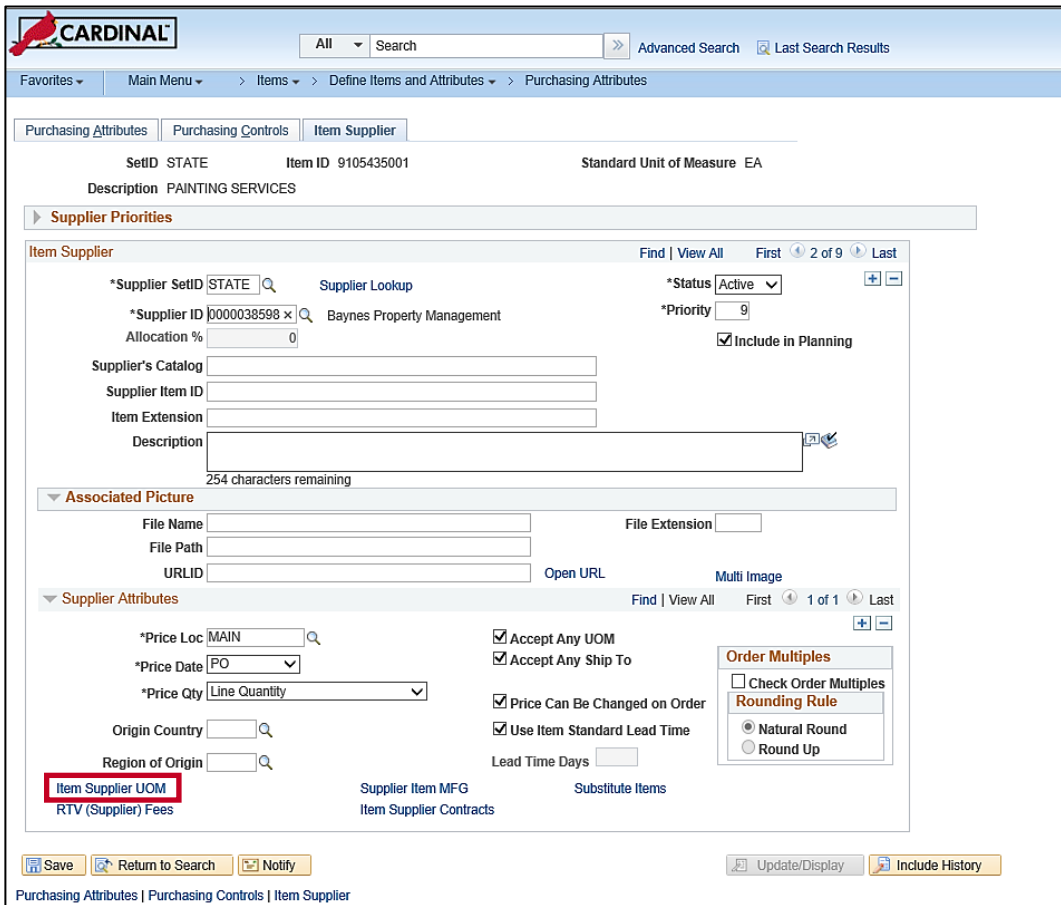
9. To add a new supplier relationship to this item, click the (+) sign in the **Item Supplier** section of the page.
10. The supplier **Priority** number is incrementally assigned. In this example, it is 9.
11. Click the **Supplier ID** lookup magnifying glass.



Supplier ID	Short Supplier Name	Supplier Name
0000038598	BAYNES PRO-001	Baynes Property Management
0000051418	BAYNES PRO-002	BAYNES PROPERTY MANAGEMENT
0000117151	BAYNESSAND-001	SANDRA BAYNES

12. Find and click the **Supplier ID** that you wish to associate with the selected item.

13. The selected supplier information populates as shown below.



CARDINAL All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Purchasing Attributes

Purchasing Attributes Purchasing Controls **Item Supplier**

SetID STATE Item ID 9105435001 Standard Unit of Measure EA
Description PAINTING SERVICES

Supplier Priorities

Item Supplier Find | View All First 2 of 9 Last

*Supplier SetID STATE Supplier Lookup *Status Active
*Supplier ID 0000038598 x Baynes Property Management *Priority 9
Allocation % 0 ☒ Include in Planning

Supplier's Catalog
Supplier Item ID
Item Extension
Description
254 characters remaining

Associated Picture

File Name File Extension
File Path
URLID Open URL Multi Image

Supplier Attributes Find | View All First 1 of 1 Last

*Price Loc MAIN *Price Date PO *Price Qty Line Quantity
Origin Country Region of Origin
Item Supplier UOM Supplier Item MFG Substitute Items
RTV (Supplier) Fees Item Supplier Contracts

☒ Accept Any UOM
☒ Accept Any Ship To
☒ Price Can Be Changed on Order
☒ Use Item Standard Lead Time
Lead Time Days

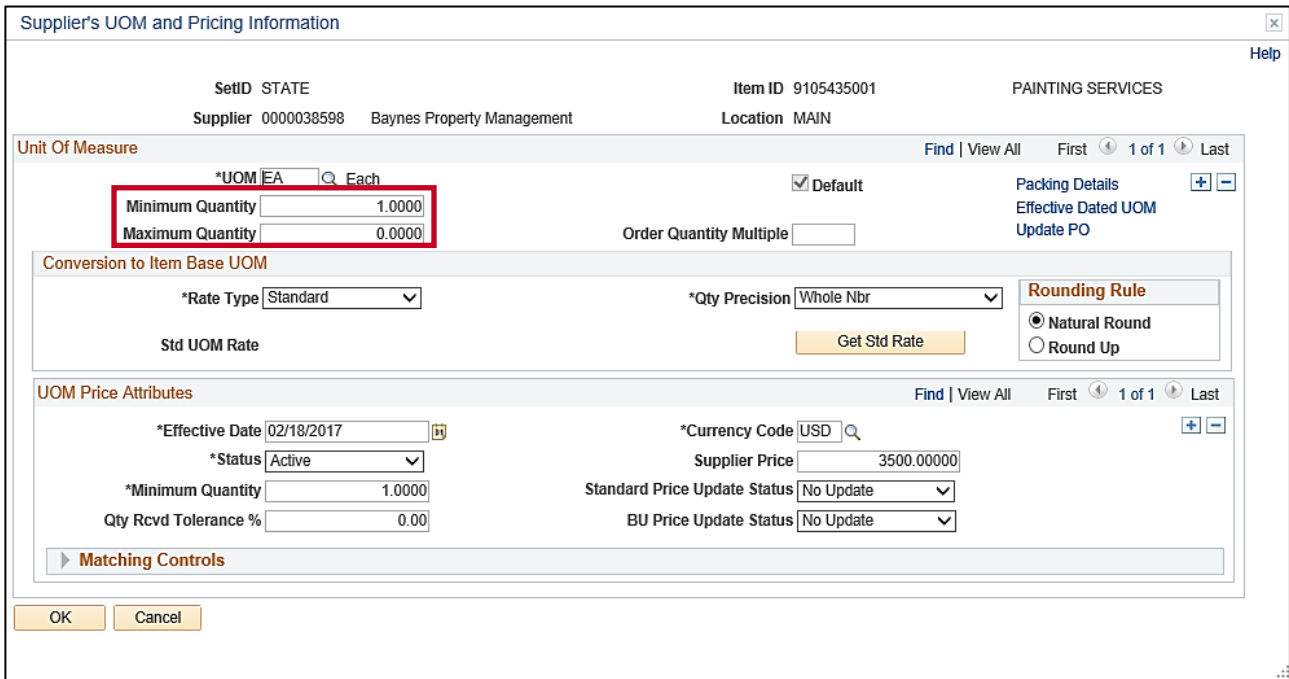
Order Multiples
☐ Check Order Multiples
Rounding Rule
☒ Natural Round
☐ Round Up

Save Return to Search Notify Update/Display Include History

Purchasing Attributes | Purchasing Controls | Item Supplier

14. Click the **Item Supplier UOM** link.

15. The **Supplier's UOM and Pricing Information** page displays.



Supplier's UOM and Pricing Information

SetID STATE Item ID 9105435001 PAINTING SERVICES

Supplier 0000038598 Baynes Property Management Location MAIN

Unit Of Measure Find | View All First 1 of 1 Last

*UOM EA Each ☒ Default Packing Details + -

Minimum Quantity 1.0000 Effective Dated UOM

Maximum Quantity 0.0000 Order Quantity Multiple Update PO

Conversion to Item Base UOM

*Rate Type Standard *Qty Precision Whole Nbr Rounding Rule

Std UOM Rate Get Std Rate ☒ Natural Round ☐ Round Up

UOM Price Attributes Find | View All First 1 of 1 Last

*Effective Date 02/18/2017 *Currency Code USD

*Status Active Supplier Price 3500.00000

*Minimum Quantity 1.0000 Standard Price Update Status No Update

Qty Rcvd Tolerance % 0.00 BU Price Update Status No Update

Matching Controls

OK Cancel

16. Item information populates as shown and is available for edit, if necessary.
17. The **Minimum Quantity** may be less than 1.
18. The **Maximum Quantity** will default to **0** and should not be changed.

Supplier's UOM and Pricing Information

SetID STATE Item ID 9105435001 PAINTING SERVICES
 Supplier 0000038598 Baynes Property Management Location MAIN

Unit Of Measure Find | View All First 1 of 1 Last
 *UOM EA Each ☒ Default Packing Details
 Minimum Quantity 1.0000 Effective Dated UOM
 Maximum Quantity 0.0000 Order Quantity Multiple Update PO

Conversion to Item Base UOM
 *Rate Type Standard *Qty Precision Decimal Rounding Rule
 Std UOM Rate Get Std Rate Natural Round
 Round Up

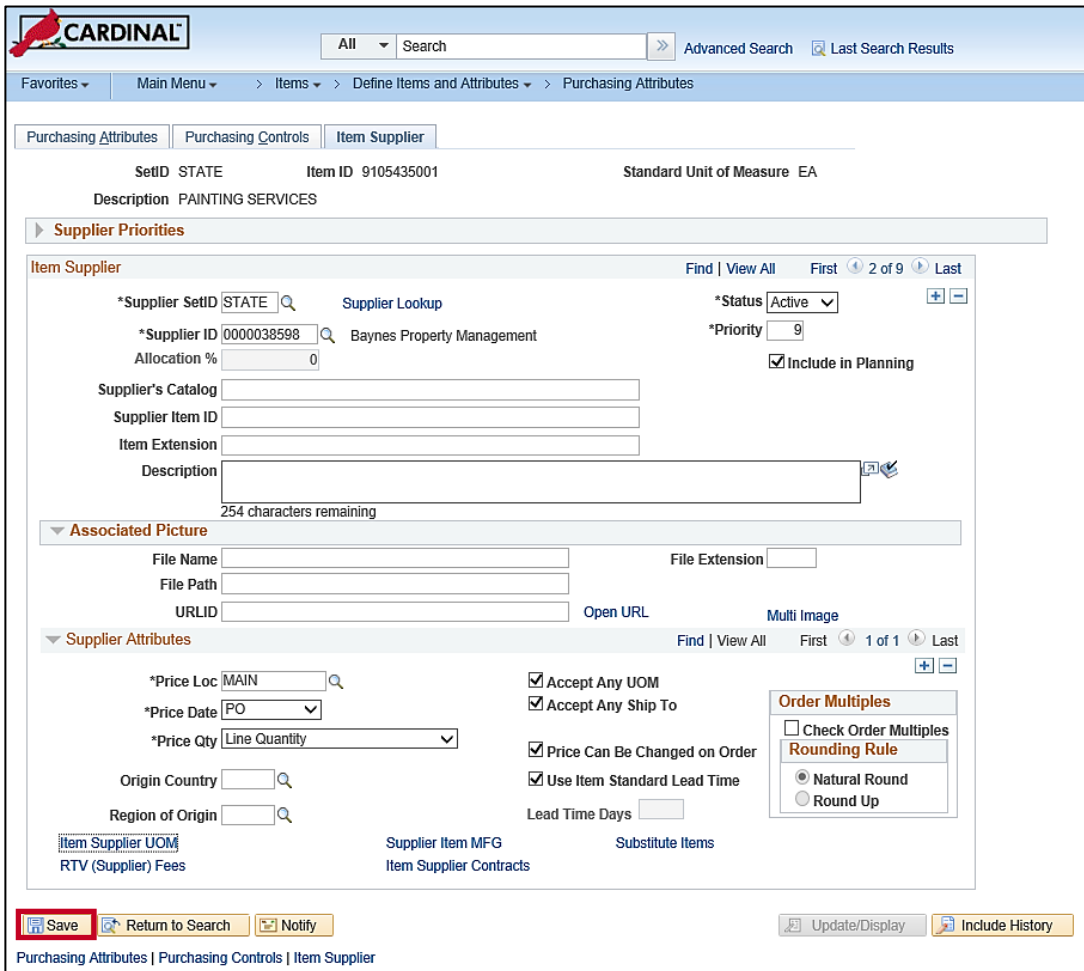
UOM Price Attributes Find | View All First 1 of 1 Last
 *Effective Date 02/18/2017 *Currency Code USD
 *Status Active Supplier Price 3500.00000
 *Minimum Quantity 1.0000 Standard Price Update Status No Update
 Qty Rcvd Tolerance % 0.00 BU Price Update Status No Update

Matching Controls

OK Cancel

19. The **Qty Precision** value defaults to **Whole Number** and should be changed to **Decimal**.
20. Click the **OK** button.

21. The **Purchasing Attributes** page displays.



CARDINAL

All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Purchasing Attributes

Purchasing Attributes Purchasing Controls Item Supplier

SetID STATE Item ID 9105435001 Standard Unit of Measure EA

Description PAINTING SERVICES

Supplier Priorities

Item Supplier Find | View All First 2 of 9 Last

*Supplier SetID STATE Supplier Lookup *Status Active

*Supplier ID 0000038598 Baynes Property Management *Priority 9

Allocation % 0 ☒ Include in Planning

Supplier's Catalog

Supplier Item ID

Item Extension

Description 254 characters remaining

Associated Picture

File Name File Extension

File Path

URLID Open URL Multi Image

Supplier Attributes Find | View All First 1 of 1 Last

*Price Loc MAIN

*Price Date PO

*Price Qty Line Quantity

Origin Country

Region of Origin

☒ Accept Any UOM

☒ Accept Any Ship To

☒ Price Can Be Changed on Order

☒ Use Item Standard Lead Time

Lead Time Days

Order Multiples

☐ Check Order Multiples

Rounding Rule

☒ Natural Round

☐ Round Up

[Item Supplier UOM](#) [Supplier Item MFG](#) [Substitute Items](#)

[RTV \(Supplier\) Fees](#) [Item Supplier Contracts](#)

Save [Return to Search](#) [Notify](#) [Update/Display](#) [Include History](#)

Purchasing Attributes | Purchasing Controls | Item Supplier

22. Click the **Save** button. The item supplier relationship is now set.

Create Item/Supplier Relationship: Strategic Sourcing Event

Upon selection and posting of the award to the bidder, the supplier/item relationship is automatically established. The item is now available to be added to any contract specific to this supplier.

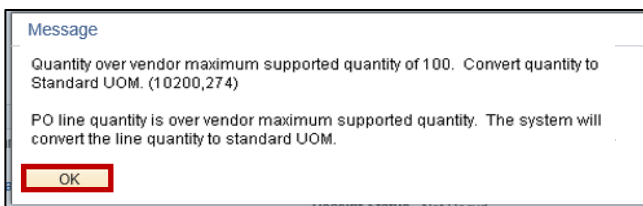
Please refer to the course entitled **PR345: Strategic Sourcing**, located on the Cardinal website in **Course Materials** under **Learning**, for additional details on creating and awarding events.

Create Item/Supplier Relationship: Purchase Order

Item/supplier relationships are not required when creating ad-hoc purchase orders. Cardinal allows the user to select any item or category for insertion into a line. POs may also be created from sourcing events or contracts.

Please refer to the course entitled **PR344: Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Learning**, for details on creating POs.

1. When entering a PO from a sourcing event where the quantity on the PO is greater than the quantity on the sourcing event, a message similar to the one below may display:



2. Click the **OK** button.
3. As the **Maximum Quantity** and **Supplier Price** default in from the sourcing event or contract, you may need to update the **Purchasing Attributes** on the **Item/Supplier Relationship** page in order to proceed.
4. Using the **Item ID** from the event or contract award, find the item and follow the steps in the section above entitled [Created a New Item/Supplier Relationship](#).

Supplier's UOM and Pricing Information

SetID STATE Item ID 9105435001 PAINTING SERVICES
 Supplier 0000038598 Baynes Property Management Location MAIN

Unit Of Measure Find | View All First 1 of 1 Last

*UOM EA Each ☒ Default Packing Details
 Minimum Quantity 1.0000 Effective Dated UOM
 Maximum Quantity 0.0000 Update PO
 Order Quantity Multiple

Conversion to Item Base UOM

*Rate Type Standard *Qty Precision Decimal Rounding Rule
 Std UOM Rate Get Std Rate Natural Round
 Round Up

UOM Price Attributes Find | View All First 1 of 1 Last

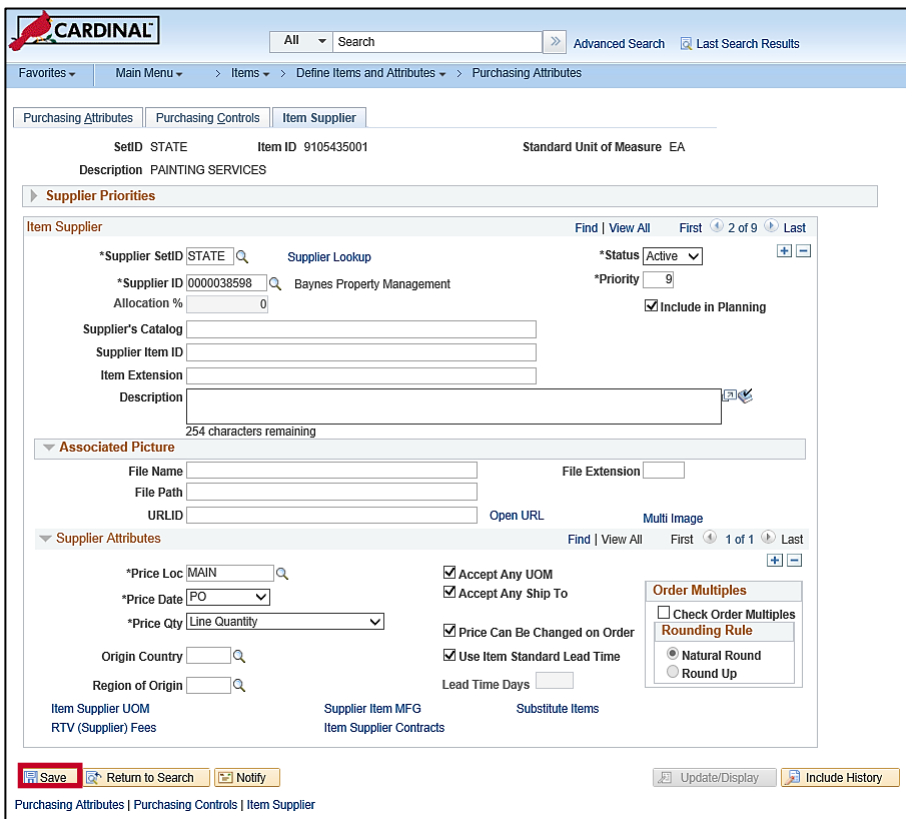
*Effective Date 02/18/2017 *Currency Code USD
 *Status Active Supplier Price 3500.00000
 *Minimum Quantity 1.0000 Standard Price Update Status No Update
 Qty Rcvd Tolerance % 0.00 BU Price Update Status No Update

Matching Controls

OK Cancel

5. Find the supplier on the **Purchasing Attributes** page
6. Using the **Item Supplier UOM** link, update the **Maximum Quantity**, **Supplier Price**, and **Qty Precision** values, as needed.
7. Click the **OK** button.

8. The **Purchasing Attributes** page displays.



9. Click the **Save** button.
10. Upon **Save**, the item/supplier relationship is updated with your changes.

Create Item/Supplier Relationship: Procurement Contract

When entering a contract using the **Item** lookup, the items listed are narrowed down to items related to the supplier selected. If the item you are searching for is not available in the list, you will need to create the relationship by following the steps noted in the section entitled [Create a New Item/Supplier Relationship](#).

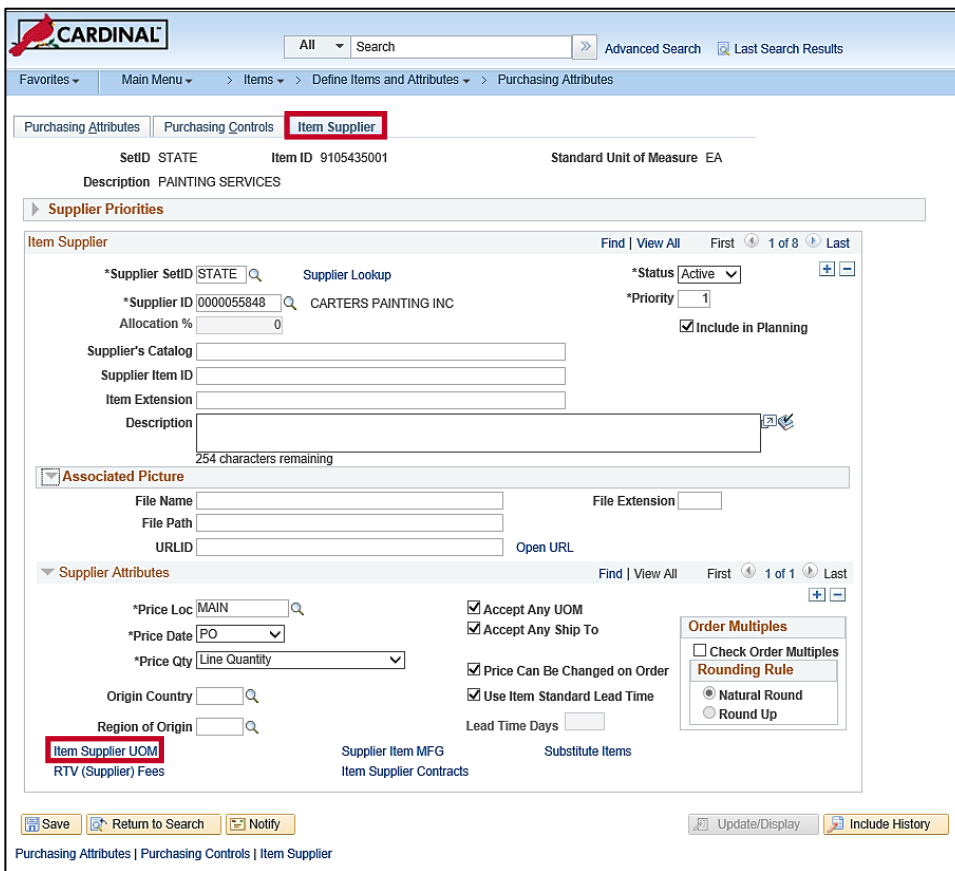
Please refer to the course entitled **501 PR348 Procurement Contracts**, located on the Cardinal website in **Course Materials** under **Learning**, for details on creating contracts.

Add an Item Unit of Measure (UOM)

Contact the VITA helpdesk to request a new **UOM** type. Be sure to reference Cardinal in the helpdesk request. Once your helpdesk request is complete, you may add the new **UOM** to an item/supplier relationship.

Example: Item 9105435001, Painting Services, has a **UOM** of **EA** (each). Item 9105435000, Painting Services, has a **UOM** of **HUR** (hour). You need to have a **UOM** of **FTK** (square foot), for a specific contract service. You can request that a new **UOM** be added via the helpdesk. Once the new **UOM** is added, you can set it up on the item/supplier relationship.

- Using the **Item ID**, find the item and follow the steps noted in the section above titled [Create a New Item/Supplier Relationship](#).



CARDINAL All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Purchasing Attributes

Purchasing Attributes Purchasing Controls **Item Supplier**

SetID STATE Item ID 9105435001 Standard Unit of Measure EA

Description PAINTING SERVICES

Supplier Priorities

Item Supplier Find | View All First 1 of 8 Last

*Supplier SetID [STATE] Supplier Lookup *Status [Active] [+]

*Supplier ID [0000055848] CARTERS PAINTING INC *Priority [1] [-]

Allocation % [0] ☒ Include in Planning

Supplier's Catalog

Supplier Item ID

Item Extension

Description 254 characters remaining

Associated Picture

File Name File Extension

File Path

URLID Open URL

Supplier Attributes Find | View All First 1 of 1 Last

*Price Loc [MAIN] ☒ Accept Any UOM

*Price Date [PO] ☒ Accept Any Ship To

*Price Qty [Line Quantity] ☒ Price Can Be Changed on Order

Origin Country ☒ Use Item Standard Lead Time

Region of Origin Lead Time Days

Item Supplier UOM Supplier Item MFG Substitute Items

RTV (Supplier) Fees Item Supplier Contracts

Order Multiples

☐ Check Order Multiples

Rounding Rule

☒ Natural Round

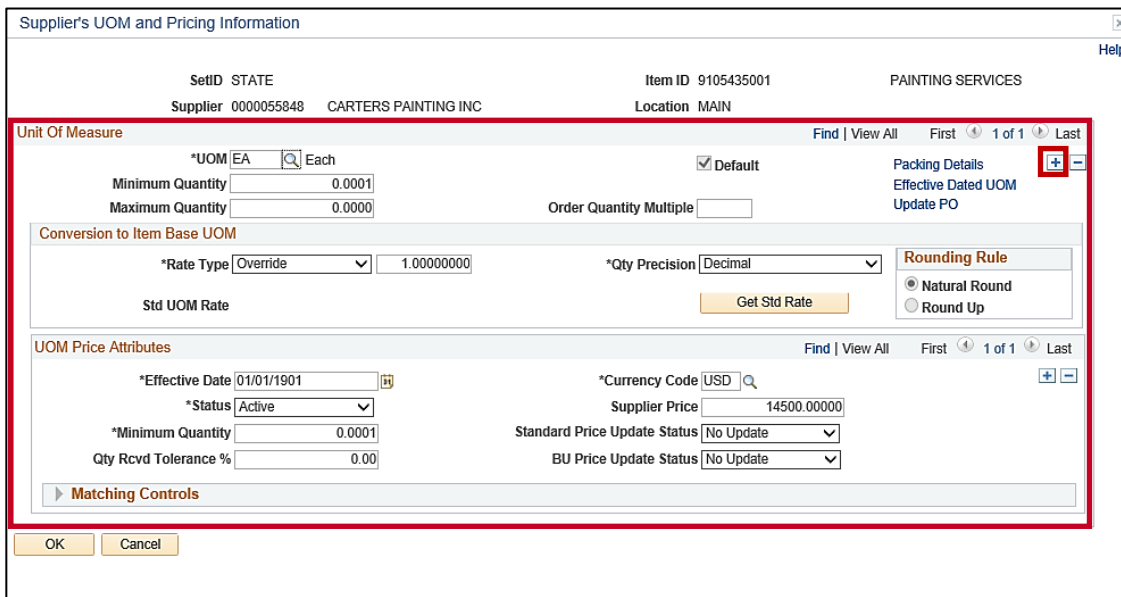
☐ Round Up

Save Return to Search Notify Update/Display Include History

Purchasing Attributes | Purchasing Controls | Item Supplier

- On the **Items Supplier** tab, locate the supplier.
- Click the **Item Supplier UOM** link.

4. The **Supplier's UOM and Pricing Information** page displays.



Supplier's UOM and Pricing Information

SetID STATE Item ID 9105435001 PAINTING SERVICES
 Supplier 000055848 CARTERS PAINTING INC Location MAIN

Unit Of Measure Find | View All First 1 of 1 Last

*UOM EA Each ☒ Default Packing Details
 Minimum Quantity 0.0001 Effective Dated UOM
 Maximum Quantity 0.0000 Order Quantity Multiple Update PO

Conversion to Item Base UOM

*Rate Type Override 1.00000000 *Qty Precision Decimal Rounding Rule
 Std UOM Rate Get Std Rate Natural Round
 Round Up

UOM Price Attributes Find | View All First 1 of 1 Last

*Effective Date 01/01/1901 *Currency Code USD
 *Status Active Supplier Price 14500.00000
 *Minimum Quantity 0.0001 Standard Price Update Status No Update
 Qty Rcvd Tolerance % 0.00 BU Price Update Status No Update

Matching Controls

OK Cancel

5. To add a new **UOM** to the relationship, click the (+) sign in the **Unit of Measure** section of the page.

Supplier's UOM and Pricing Information

SetID STATE Item ID 9105435001 PAINTING SERVICES
 Supplier 0000055848 CARTERS PAINTING INC Location MAIN

Unit Of Measure Find | View All First 2 of 2 Last

*UOM FTK ☐ Default

Minimum Quantity 1.0000
 Maximum Quantity 0.0000 Order Quantity Multiple

Conversion to Item Base UOM

*Rate Type Standard *Qty Precision Decimal **Rounding Rule**
 Std UOM Rate Get Std Rate Natural Round
 Round Up

UOM Price Attributes Find | View All First 1 of 1 Last

*Effective Date 02/18/2017 *Currency Code
 *Status Active **Supplier Price** 1.00000
 *Minimum Quantity 1.0000 Standard Price Update Status No Update
 Qty Rcvd Tolerance % 0.00 BU Price Update Status No Update

Matching Controls

OK Cancel

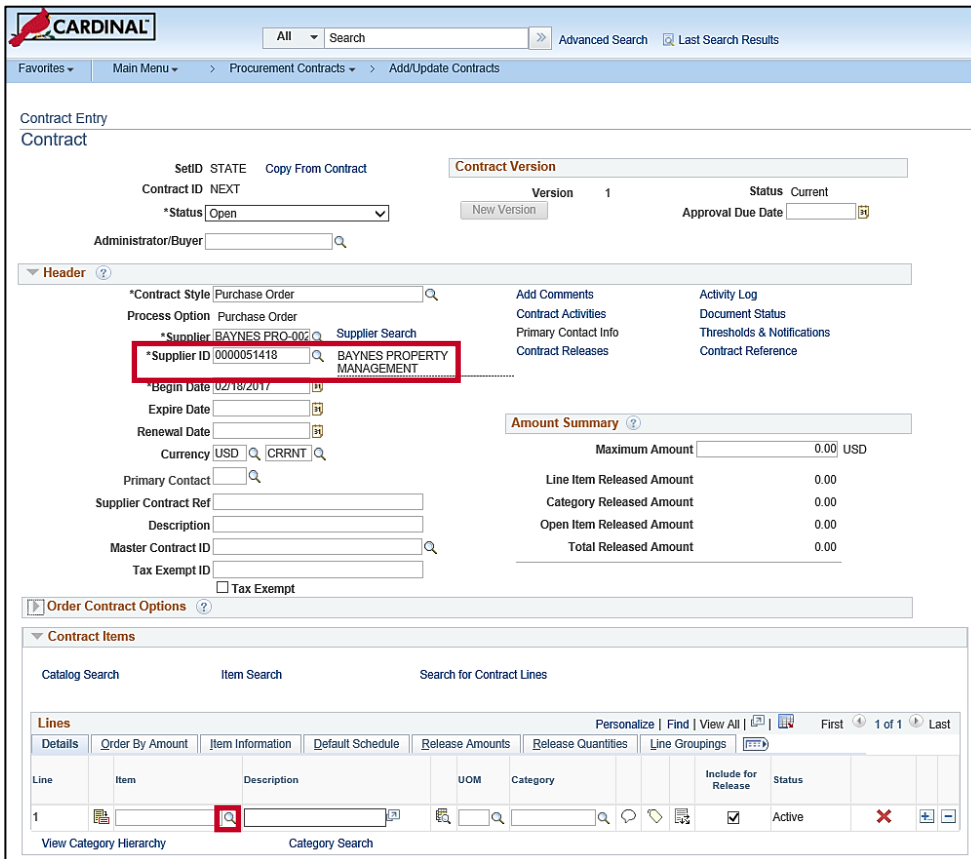
6. Select the new **UOM** using the **Look Up UOM** magnifying glass.
7. Update the **Qty Precision** to **Decimal**.
8. Enter a **Supplier Price**. Any value may be entered and this information will default on the PO.
9. Click the **OK** button.
10. The **Purchasing Attributes** page displays.
11. On the **Purchasing Attributes** page click the **Save** button. The item is now set up with the additional UOM and is available for selection when using this supplier.

Example: Update the UOM on a Procurement Contract

Previously, we added the new **UOM** of **FTK** on the item (**9105435001**)/supplier (**000051418**) relationship.

1. To use this **UOM** on a procurement contract, navigate to **Contract Entry – Contract** using the following path:

Main Menu > Procurement Contracts > Add/Update Contracts



The screenshot displays the 'Contract Entry' form in the Cardinal system. The 'Supplier ID' field is highlighted with a red box, showing the value '0000051418' and the supplier name 'BAYNES PROPERTY MANAGEMENT'. The form includes various sections for contract details, including 'Header', 'Amount Summary', 'Order Contract Options', and 'Contract Items'.

Note: For additional details on creating contracts please refer to the course entitled **PR348: Procurement Contracts**, located on the Cardinal website in **Course Materials** under **Learning**.

2. Create a contract using **Supplier ID 0000051418**.
3. Click the **Look up Contract Line Type ID** icon to select the **Item ID 9105435001**.

Look Up Contract Line Type ID

Supplier SetID STATE
Supplier ID 0000051418
Item SetID STATE
Item ID begins with
Item Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-8 of 8 Last

Item ID	Item Description
6404460000	PACKING LIST ENVELOPES, SELF-A
8015801000	SIGNS: BILLBOARD, ADVERTISING,
9105435001	PAINTING SERVICES
9716001000	PROPERTY MANAGEMENT SERVICES
9883601000	GROUNDS MAINTENANCE: MOWING, E
9883642000	GROUNDS MAINTENANCE: MOWING, E

- The items listed are narrowed down to items related to the supplier selected.
- Click the **Item Id 9105435001** link.

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines Personalize Find View All First 1 of 1 Last

Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings

Line	Item	Description	UOM	Category	Include for Release	Status
1	9105435001	PAINTING SERVICES	EA	9105435	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

- The default **UOM** of **EA** is automatically populated.
- Click the **Line Details** icon to the left of the **Item**.

8. The **Details for Line X** page displays.

Details for Line 1

Contract ID NEXT Version 1 Supplier BAYNES PRO-002

Line 1 Item ID 9105435001 PAINTING SERVICES PAINTING SER

Line Details

Category 9105435 Status Active

Description Category ID 04244 Physical Nature Goods

Transaction Item Description:
PAINTING SERVICES PAINTING SERVICES

219 characters remaining
Preferred Language Item Description:
PAINTING SERVICES PAINTING SERVICES

Expand All Collapse All

Item Information

Release Amounts / Quantities

Pricing Information

☐ Use Contract Base Price ☐ Use Supp Price UOM Adjustments

☒ Price Can Be Changed on Order ☐ Use Supplier Price Shipto Adj

Price Date PO Date Adjust Before Contract Adjustments

Price Qty Line Quantity

Qty Type Current Order Quantity

Order By Amount

☐ Amount Only

Merchandise Amount

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing Personalize Find View All First 1 of 1 Last

Price Loc	UOM	Base Price	Curr
<input checked="" type="checkbox"/> MAIN	EA	3500.00000	USD

9. Expand the **Pricing Information** section by clicking on the arrow to the left of the section title.
10. Click the **UOM** lookup icon.

Look Up UOM Help

Unit of Measure

Description

[Basic Lookup](#)

Search Results

View 100 First 1-2 of 2 Last

Unit of Measure	Description
EA	Each
FTK	Square Foot

11. Both **UOMs** are available.
12. Select the **Square Foot** link.

Transaction Item Description:
PAINTING SERVICES PAINTING SERVICES

219 characters remaining

Preferred Language Item Description:
PAINTING SERVICES PAINTING SERVICES

[Expand All](#) [Collapse All](#)

► **Item Information**

► **Release Amounts / Quantities**

▼ **Pricing Information**

☐ Use Contract Base Price ☐ Use Supp Price UOM Adjustments

☒ Price Can Be Changed on Order ☐ Use Supplier Price Shipto Adj

Price Date Adjust

Price Qty **Order By Amount**

Qty Type ☐ Amount Only

Merchandise Amount

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing [Personalize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

	Price Loc	UOM	Base Price	Curr
<input checked="" type="checkbox"/>	MAIN	FTK	1.00000	USD

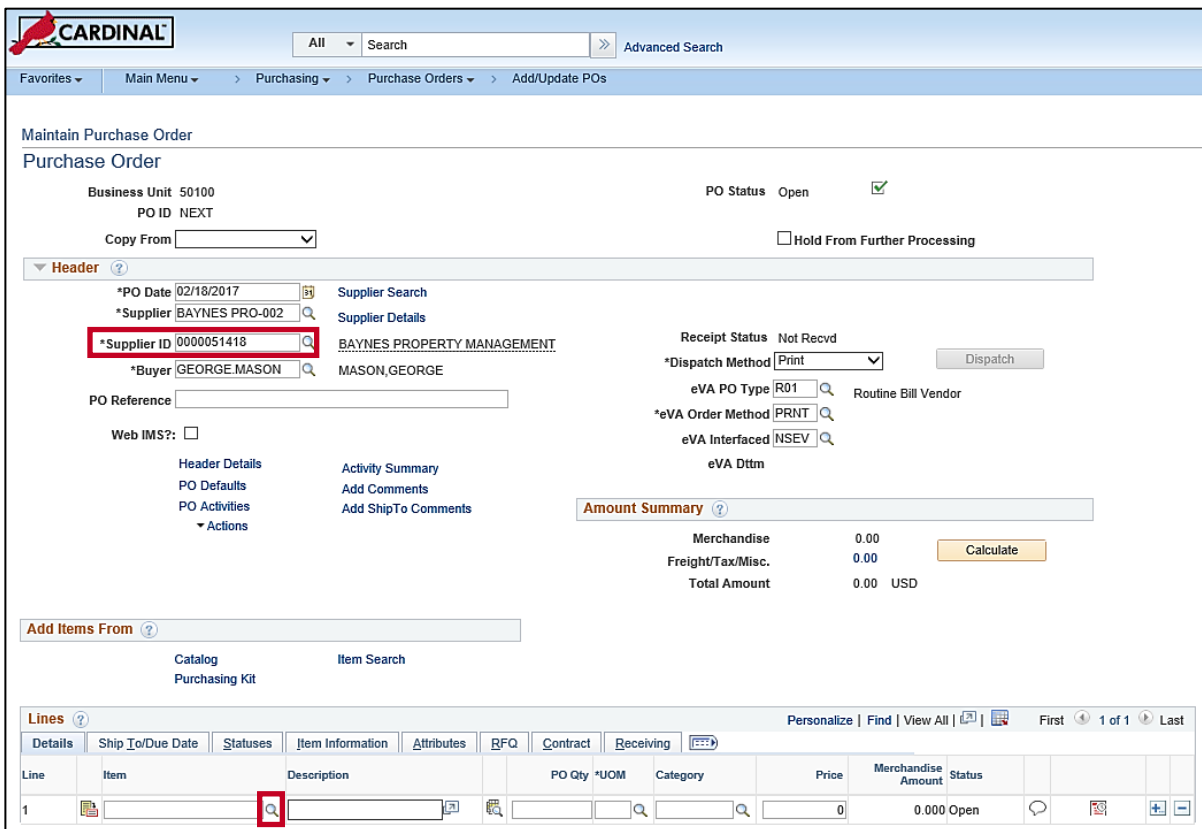
13. The **FTK** (i.e., square foot), **UOM** is populated.
14. Click the **OK** button and complete the contract entry procedures.

Example: Update the UOM on a Purchase Order

Previously we added the new **UOM** of **FTK** on the item (9105435001)/supplier (000051418) relationship.

1. To use this **UOM** on a PO, navigate to the **Maintain Purchase Order – Purchase Order** page using the following path:

Main Menu > Purchasing > Purchase orders > Add/Update POs



Cardinal All Search Advanced Search

Favorites Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order
Purchase Order

Business Unit 50100 PO ID NEXT PO Status Open ☒

Copy From ☐ Hold From Further Processing

Header ?

*PO Date 02/18/2017 Supplier Search
*Supplier BAYNES PRO-002 Supplier Details
*Supplier ID 000051418 BAYNES PROPERTY MANAGEMENT
*Buyer GEORGE.MASON MASON,GEORGE
PO Reference
Web IMS?: ☐
Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions

Receipt Status Not Recvd
*Dispatch Method Print Dispatch
eVA PO Type R01 Routine Bill Vendor
*eVA Order Method PRINT
eVA Interfaced NSEV
eVA Dtm

Amount Summary ?

Merchandise	0.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Add Items From ?

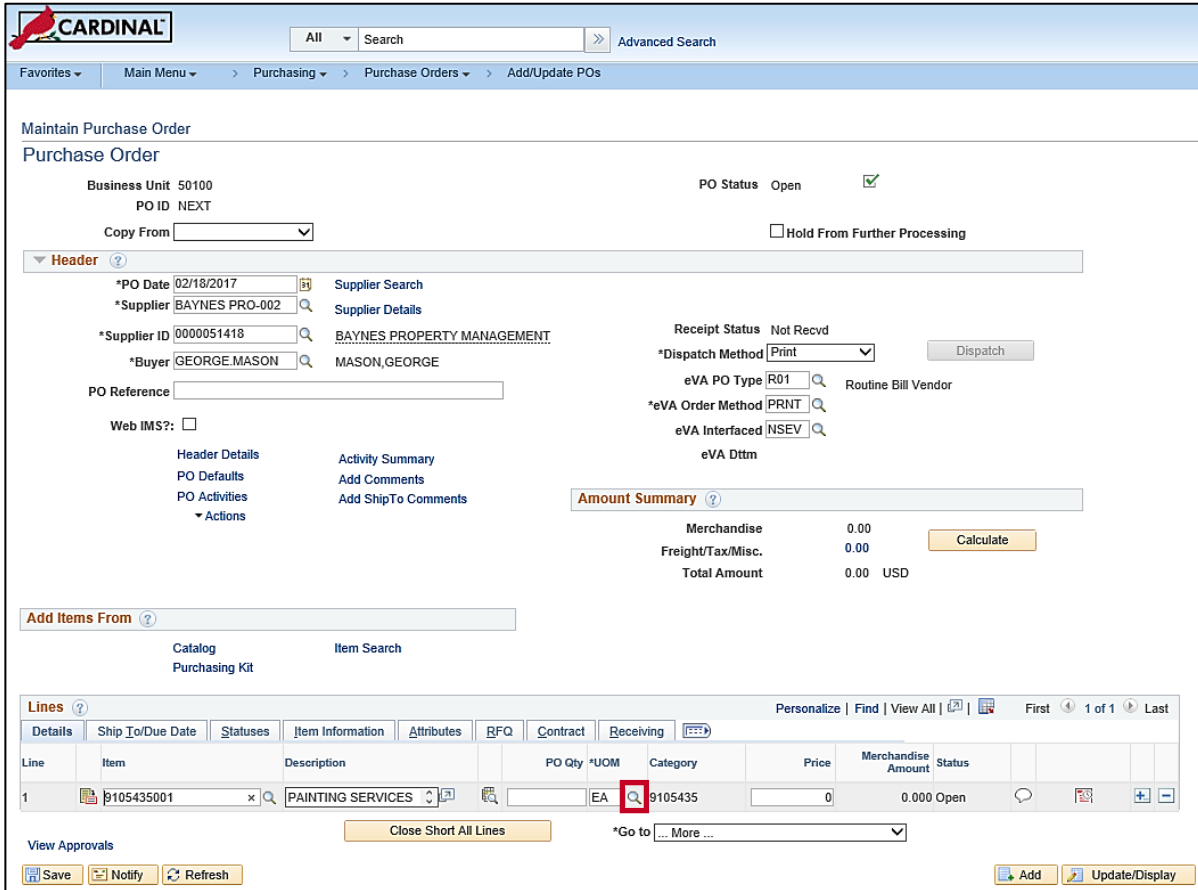
Catalog Item Search
Purchasing Kit

Lines ? Personalize Find View All First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1						0	0.000	Open

Note: For additional details on creating contracts, please refer to the course entitled **PR344 Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Learning**.

2. Create a PO using **Supplier ID 000051418**
3. Follow normal PO procedures, as referenced in the course entitled **PR344: Processing Purchase Orders**, to find and select the **Item 9105435001**.



Cardinal All Search Advanced Search

Favorites Main Menu Purchasing Purchase Orders Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Open

PO ID NEXT

Copy From Hold From Further Processing

Header

*PO Date 02/18/2017 Supplier Search

*Supplier BAYNES PRO-002 Supplier Details

*Supplier ID 0000051418 BAYNES PROPERTY MANAGEMENT

*Buyer GEORGE.MASON MASON,GEORGE

PO Reference

Web IMS?:

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Actions

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

*eVA Order Method PRINT

eVA Interfaced INSEV

eVA Dttm

Amount Summary

Merchandise 0.00

Freight/Tax/Misc. 0.00 Calculate

Total Amount 0.00 USD

Add Items From

Catalog Item Search

Lines

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find View All First 1 of 1 Last

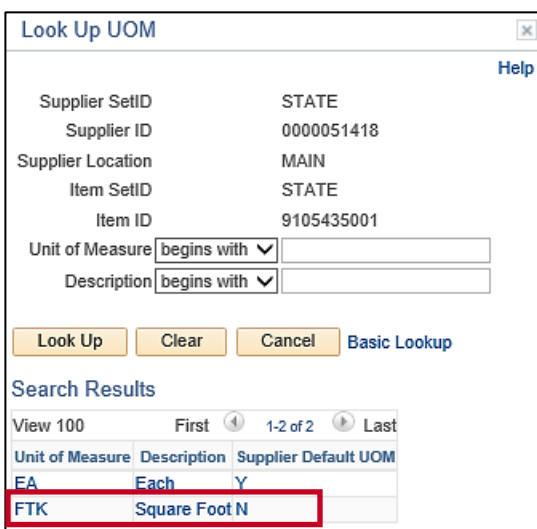
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	9105435001	PAINTING SERVICES		EA	9105435	0	0.000	Open

View Approvals Close Short All Lines *Go to More

Save Notify Refresh Add Update/Display

4. The default **UOM** of **EA** is automatically populated.

5. Click the **Look up UOM** icon.



Look Up UOM

Supplier SetID STATE

Supplier ID 0000051418

Supplier Location MAIN

Item SetID STATE

Item ID 9105435001

Unit of Measure begins with

Description begins with

Look Up Clear Cancel Basic Lookup

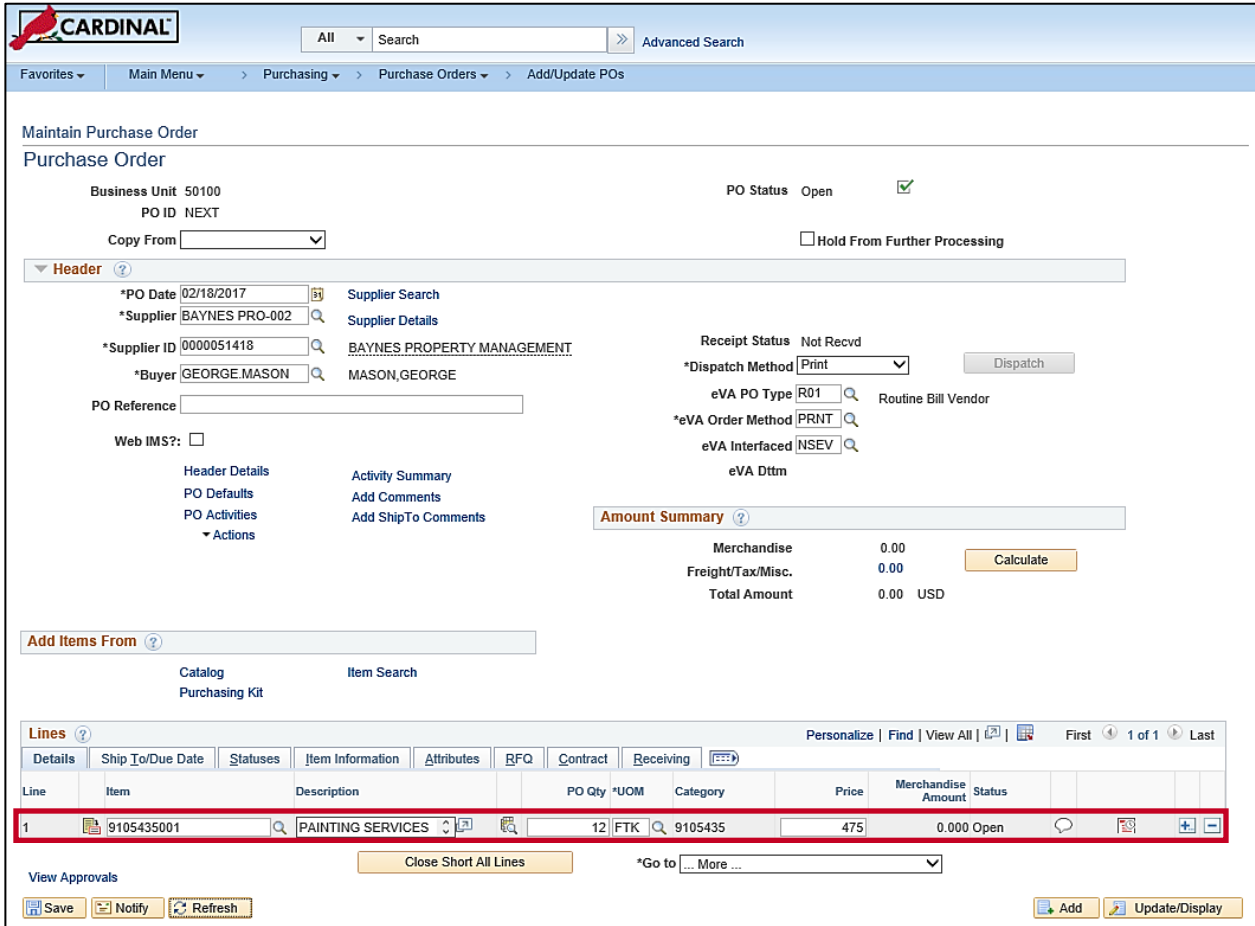
Search Results

View 100 First 1-2 of 2 Last

Unit of Measure	Description	Supplier Default UOM
EA	Each	Y
FTK	Square Foot	N

6. All **UOMs** for this item supplier relationship display and may be selected.

7. Click the **FTK Unit of Measure** link.



Cardinal All Search Advanced Search

Favorites Main Menu Purchasing Purchase Orders Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Open ☒

PO ID NEXT

Copy From ☐ Hold From Further Processing

Header

*PO Date 02/18/2017 Supplier Search

*Supplier BAYNES PRO-002 Supplier Details

*Supplier ID 0000051418 BAYNES PROPERTY MANAGEMENT

*Buyer GEORGE.MASON MASON,GEORGE

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

*eVA Order Method PRINT

eVA Interfaced NSEV

eVA Dttm

PO Reference

Web IMS?: ☐

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Actions

Amount Summary

Merchandise	0.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Add Items From

Catalog Item Search

Purchasing Kit

Lines

Personalize Find View All First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	9105435001	PAINTING SERVICES	12	FTK	9105435	475	0.000	Open

View Approvals Close Short All Lines *Go to More ...

Save Notify Refresh Add Update/Display

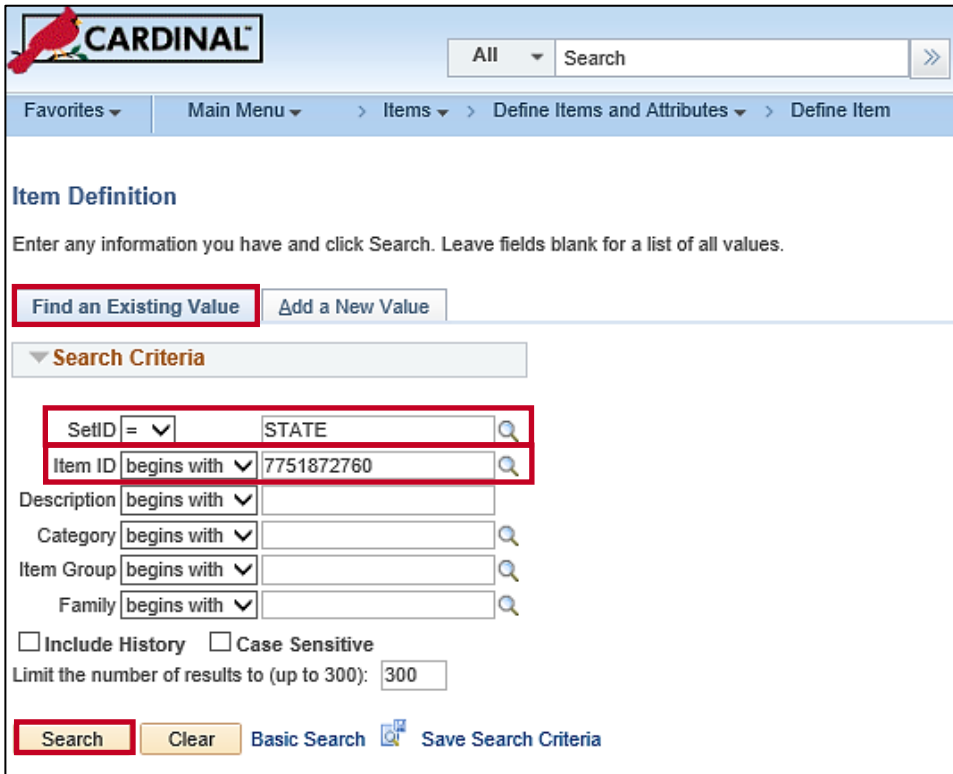
PO line information updates based on the selected UOM and is ready for completion.

- Follow normal PO procedures, as referenced in the course entitled **PR344: Processing Purchase Orders**, to complete your PO.

Inactivate an Item

- Once an NIGP number/**Item ID** is entered into Cardinal it cannot be modified or deleted. However, you can make changes, inactivate, and in some cases, reactivate the **Item ID**. To inactivate an **Item ID**, navigate to the **Item Definition** page using the following path:

Main Menu > Items > Define Items and Attributes > Define Item



CARDINAL

All Search

Favorites Main Menu > Items > Define Items and Attributes > Define Item

Item Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

SetID = STATE

Item ID begins with 7751872760

Description begins with

Category begins with

Item Group begins with

Family begins with

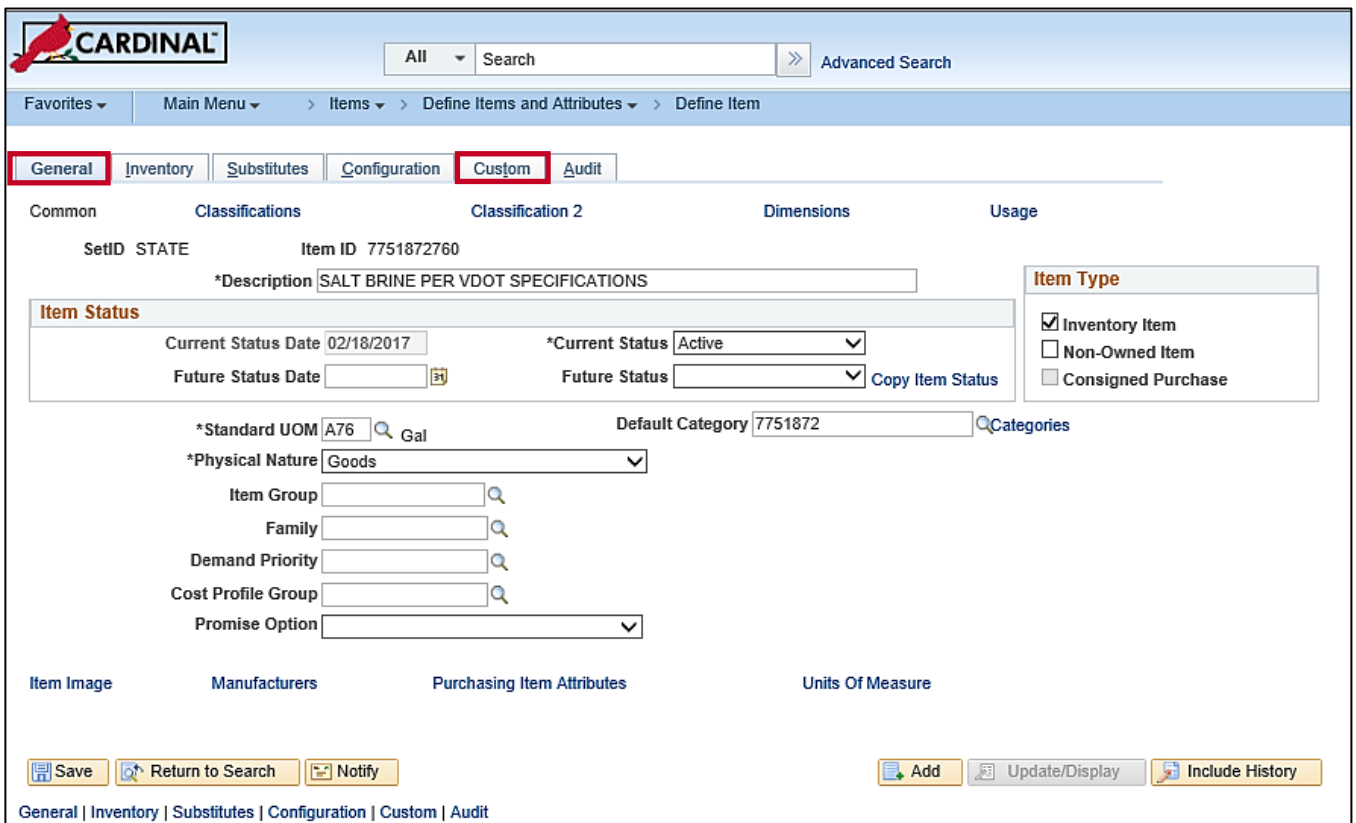
☐ Include History ☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

- Click the **Find an Existing Value** tab.
- Ensure that **STATE** is listed in the **SETID** field.
- Enter the NIGP number/**Item ID** you want to find.
- Click the **Search** button.

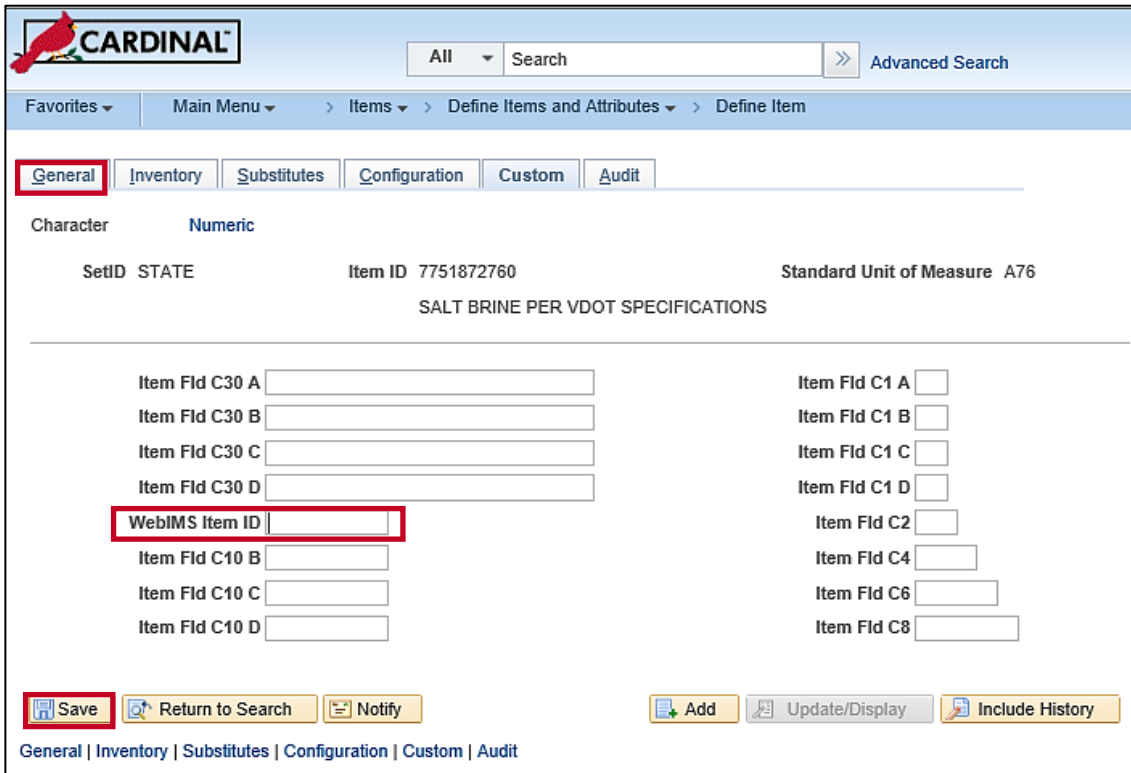
6. The **General** tab displays.



The screenshot shows the 'Define Item' form in the Cardinal system, with the 'General' tab selected. The form is divided into several sections:

- Header:** Includes the Cardinal logo, a search bar with 'All' and 'Search' buttons, and an 'Advanced Search' link.
- Navigation:** A breadcrumb trail shows 'Main Menu > Items > Define Items and Attributes > Define Item'. Below this are tabs for 'General', 'Inventory', 'Substitutes', 'Configuration', 'Custom', and 'Audit'. The 'General' tab is currently active.
- Form Fields:**
 - Common:** Includes 'SetID STATE' and 'Item ID 7751872760'.
 - Classifications:** Includes 'Classification 2'.
 - Description:** A text field containing '*Description SALT BRINE PER VDOT SPECIFICATIONS'.
 - Item Status:** A section with 'Current Status Date 02/18/2017', 'Future Status Date', '*Current Status' (dropdown menu set to 'Active'), and 'Future Status' (dropdown menu). A 'Copy Item Status' button is also present.
 - Item Type:** A section with three checkboxes: 'Inventory Item' (checked), 'Non-Owned Item', and 'Consigned Purchase'.
 - Standard UOM:** A dropdown menu set to 'A76' with a search icon and the text 'Gal'.
 - Default Category:** A dropdown menu set to '7751872' with a search icon and the text 'Categories'.
 - Physical Nature:** A dropdown menu set to 'Goods'.
 - Item Group:** A text field with a search icon.
 - Family:** A text field with a search icon.
 - Demand Priority:** A text field with a search icon.
 - Cost Profile Group:** A text field with a search icon.
 - Promise Option:** A dropdown menu.
- Footer:** Includes a row of buttons: 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'. Below the buttons is a breadcrumb trail: 'General | Inventory | Substitutes | Configuration | Custom | Audit'.

7. Click the **Custom** tab.



The screenshot shows the 'Define Item' page in the Cardinal system. The 'General' tab is selected and highlighted with a red box. The page displays the following information:

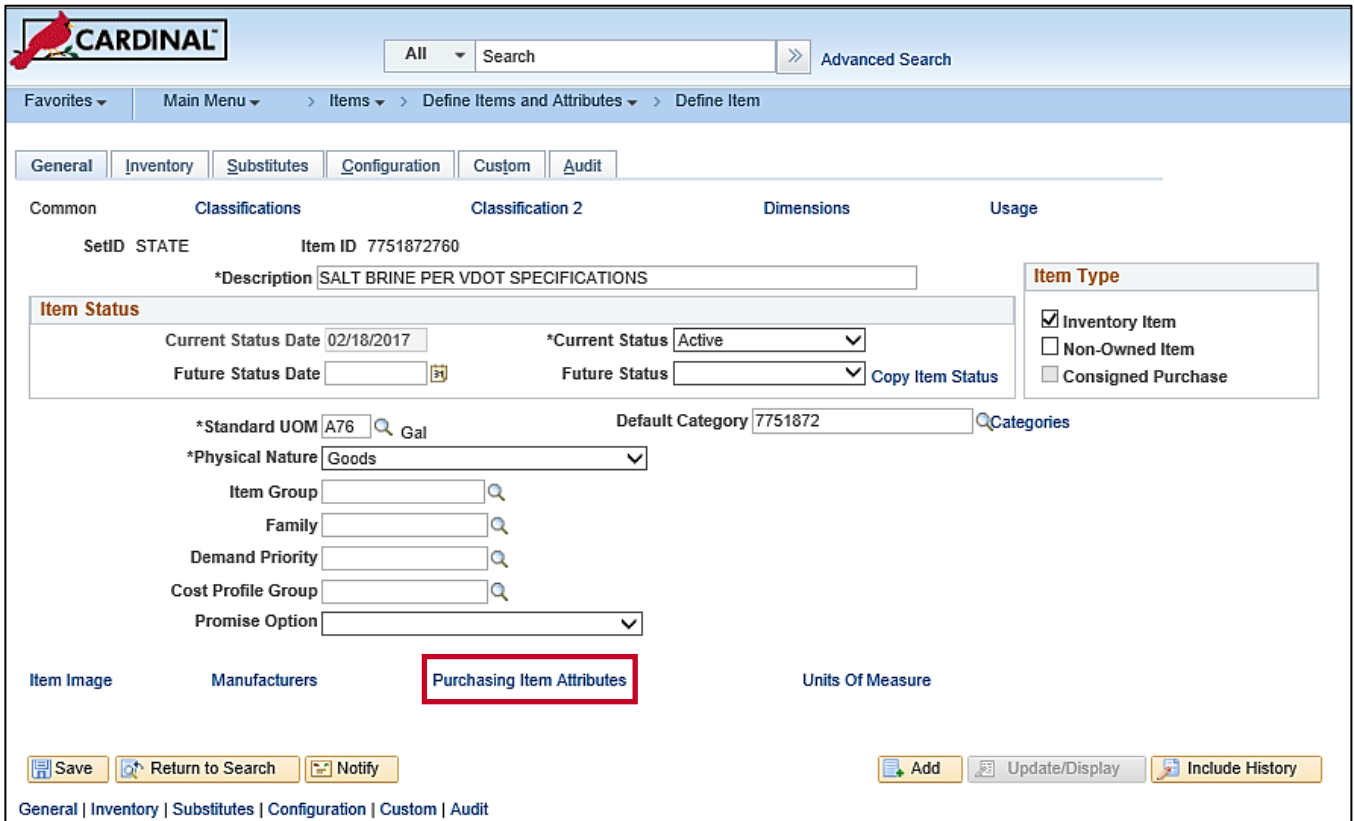
- Character:** Numeric
- SetID:** STATE
- Item ID:** 7751872760
- Standard Unit of Measure:** A76
- Description:** SALT BRINE PER VDOT SPECIFICATIONS

Below this information are two columns of input fields for item attributes:

- Left Column:** Item Fld C30 A, B, C, D, WebIMS Item ID (highlighted with a red box), C10 B, C, D.
- Right Column:** Item Fld C1 A, B, C, D, C2, C4, C6, C8.

At the bottom, there are buttons for 'Save' (highlighted with a red box), 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'. A breadcrumb trail at the bottom reads: General | Inventory | Substitutes | Configuration | Custom | Audit.

8. Remove the **WebIMS Item ID** value (stock number).
9. Click the **Save** button.
10. Click the **General** tab.



11. If the item should be removed from both inventory and non-inventory, click the **Purchasing Item Attributes** link.

Purchase Items Attributes

Purchasing Attributes | Purchasing Controls | Item Supplier

SetID STATE Item ID 7751872760 Standard Unit of Measure A76

Description SALT BRINE PER VDOT SPECIFICATIONS

PO Available Date 02/18/2017

Unavailable 02/18/2017

☐ Use as Substitute Item Only

Standard Price A76

Last PO Price

*Currency USD Dollar

Lead Time Days

*Item Descr SALT BRINE PER VDOT SPECIFICAT SALT BRINE

Category 7751872

Model

Asset Profile ID

Ultimate Use Code

Physical Nature Goods

Primary Buyer

*Long Description
SALT BRINE PER VDOT SPECIFICATIONS
220 characters remaining

Associated Picture

File Name

File Extension

Chartfields Personalize | Find | View All | First 1 of 1 Last

*Account 5012550 Task

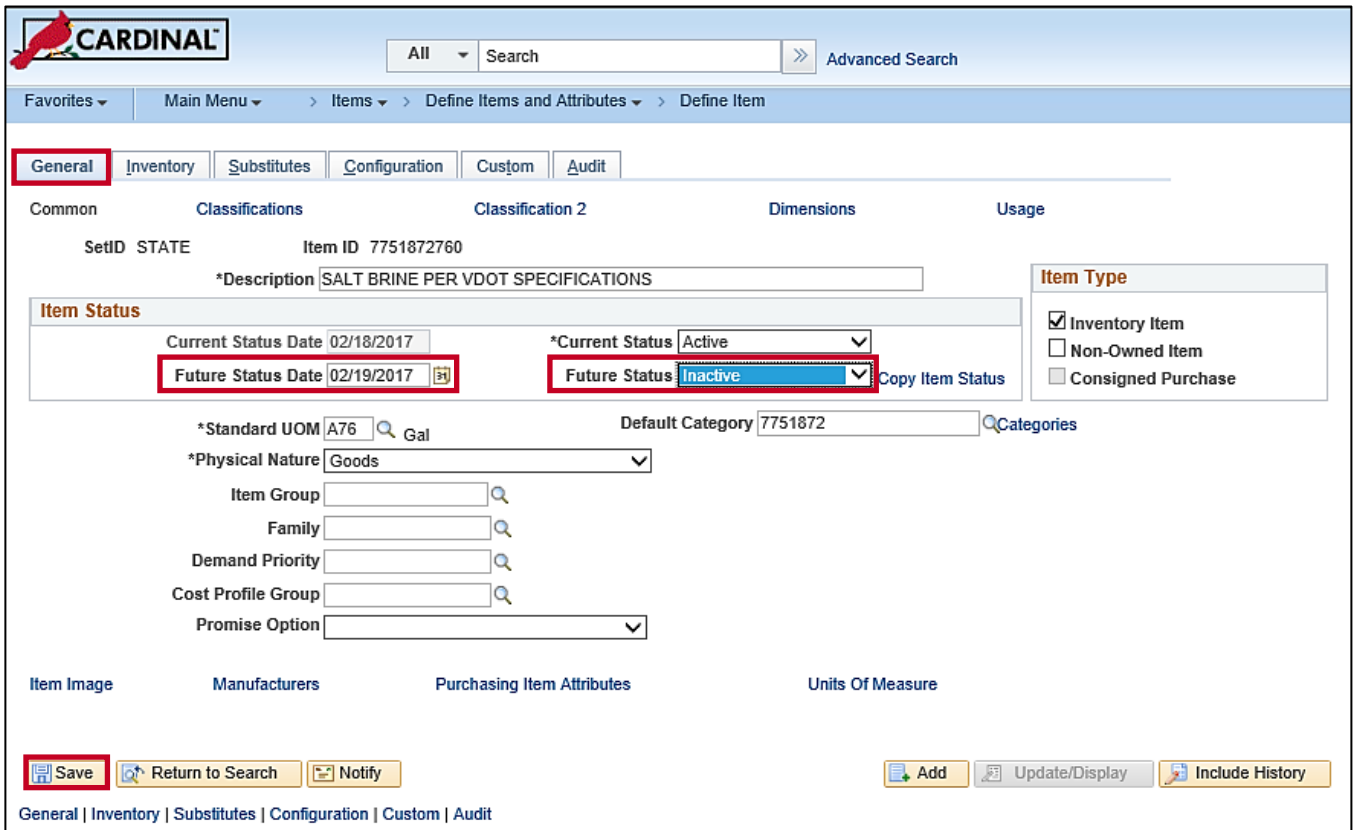
Item Specifications Packing Details
VAT Default VAT Service Treatment Setup

OK Cancel **Apply**

Purchasing Attributes | Purchasing Controls | Item Supplier

12. Change the **Unavailable** field date value to today's date.
13. Click the **Apply** button.
14. Click the **OK** button.

15. The **General** tab displays.



CARDINAL All Search Advanced Search

Favorites Main Menu Items Define Items and Attributes Define Item

General Inventory Substitutes Configuration Custom Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

*Description SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date 02/18/2017 *Current Status Active

Future Status Date 02/19/2017 Future Status Inactive Copy Item Status

*Standard UOM A76 Gal Default Category 7751872 Categories

*Physical Nature Goods

Item Group Family Demand Priority Cost Profile Group Promise Option

Item Image Manufacturers Purchasing Item Attributes Units Of Measure

Save Return to Search Notify Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

16. Change the **Future Status Date** field to tomorrow's date.
17. Select **Inactive** from the **Future Status** drop-down menu.
18. Click the **Save** button. Your entries are saved and the item is unavailable effective immediately.